

CMIS

Configuration Management Information System



SYSTEMS ENGINEERING ORGANIZATION, PENSACOLA, FL

Release 01-01

April 2001

Document No. CM-UM-01

REV. 000 CHG. 000

Table of Contents

Chapter 1 Configuration Management and CMIS.....	1-1
Overview.....	1
What is Configuration Management?	1
Why is Configuration Management Important?	2
What Does Configuration Management Cost?	2
Configuration Management Information System (CMIS)	3
CMIS Roles and Responsibilities	4
Functional Organization	6
Technical Organization.....	6
CMIS Processing	6
CMIS Terminology.....	7
SCR Process Flow	7
Requirements for Using CMIS	11
Security	11
Chapter 2 Introduction to the CMIS Application.....	2-1
Overview.....	1
CMIS Startup	1
Overview.....	1
Steps for Logging in and Selecting an AIS/User Type	2
Main CMIS Window	3
Title Bar.....	4
Menu Bar	4
Toolbars	5
Status Bar.....	6
Window Focus and Controls.....	7
Using CMIS Help	9
Reference Help	10
How Do I? Window	10
On-Line User's Guide.....	11
Release Notes Window	12
About Window.....	12
Preferences Window	12
Overview.....	12
Steps for Changing Preferences	13
Printer Setup Window.....	13
Overview.....	13
Steps for Changing Printer Settings.....	14
Print Options Window	15
Overview.....	15
Print Preview Window Options	16
Steps for Filtering, Previewing, and Printing a Report	16
Contacting the CMIS Help Desk	19
CMIS Operations Help Desk	19

Chapter 3 CMIS User Types and Common Tasks	3-1
Overview.....	1
CMIS User Types and Their Most Common Tasks.....	1
Common Tasks: All CMIS User Types	1
Common Tasks: All CMIS User Types	2
Release Management User Type	3
Technical/Functional Employee User Type.....	4
Technical/Functional Action Manager User Types	8
Technical Change Coordinator User Type.....	14
Technical Action Manager/Change Coordinator User Type.....	21
Functional Action Manager/Change Coordinator User Type	28
Technical Configuration Manager User Type	34
Technical/Functional Remote User User Type	35
Technical Higher Authority User Type	35
Technical Supervisor User Type.....	36
Chapter 4 AIS Maintenance Window	4-1
Overview.....	1
AIS Maintenance Window Options	2
Steps for Creating a New AIS, Adding an AIS Member, and Entering AIS Accounting Data	4
Steps for Deleting an AIS Member.....	8
Steps for Creating a New SCR Rejection Reason.....	9
Steps for Deleting an SCR Rejection Reason	10
Steps for Creating a New SCR Note Category	10
Steps for Modifying an SCR Note Category	11
Steps for Deleting an SCR Note Category.....	12
Steps for Creating a New SCR Sub-System	12
Steps for Modifying an SCR Sub-System.....	13
Steps for Deleting an SCR Sub-System.....	13
Steps for Creating a New TDR Origin.....	14
Steps for Modifying a TDR Origin.....	15
Steps for Deleting a TDR Origin	15
Steps for Creating a New TDR Priority	15
Steps for Modifying a TDR Priority	16
Steps for Deleting a TDR Priority	17
Steps for Creating a New TDR Criticality	17
Steps for Modifying a TDR Criticality	18
Steps for Deleting a TDR Criticality.....	19
Steps for Deleting an AIS	19
Chapter 5 Resource Maintenance and Security Classifications Windows.....	5-1
Overview.....	1
<i>Resource Maintenance and Security Classifications Windows Options</i>	<i>1</i>
Steps for Creating a New Resource	2
Steps for Adding/Modifying Resource AIS Access.....	4
Steps for Creating/Modifying an Acting Assignment.....	9
Steps for Adding and Modifying Resource Unavailability	11
Steps for Reassigning a Resource	13
Steps for Changing a User ID	14
Steps for Changing Your Password	15
Steps for Creating/Modifying a Security Class.....	16

Chapter 6 Internal Mail System	6-1
Overview.....	1
Internal Mail System Window Options	1
Steps for Creating a Mail Group	2
Steps for Creating and Sending a Mail Message	3
Steps for Configuring CMIS Mail to Interface with an External Mail System.....	6
Steps for Displaying To Do List Messages.....	6
Steps for Displaying Notify Messages.....	8
Steps for Forwarding a Message.....	9
Steps for Printing a Mail Report	11
 Chapter 7 Program Trouble Report Window	 7-1
Overview.....	1
Program Trouble Report Options.....	1
Steps for Creating a Program Trouble Report	2
Steps for Adding a PTR Relationship.....	4
Steps for Creating an SCR from a PTR	5
Steps for Closing a PTR.....	6
Steps for Duplicating a PTR	7
Steps for Referring a PTR.....	8
Steps for Printing PTR Reports	9
Steps for Deleting a PTR	9
 Chapter 8 Configuration Item Types Window.....	 8-1
Overview.....	1
Configuration Item Types Window Options.....	1
Steps for Creating a New CI Type.....	2
Steps for Modifying a CI Type Description.....	3
Steps for Deleting a CI Type	3
Steps for Importing CI Types	4
Steps for Printing CI Types.....	8
 Chapter 9 Configuration Item Window	 9-1
Overview.....	1
Configuration Item Window User Options.....	1
Steps for Creating a New CI.....	2
Steps for Modifying CI Details.....	4
Steps for Deleting a Configuration Item	5
Steps for Undeleting a CI.....	6
Steps for Adding CI Quality Assurance Information.....	8
Steps for Importing CI's and Making Mass Changes to CI's	8
Steps for Viewing CI CCO's	11
Steps for Printing the Configuration Items Report	12

Chapter 10 System Change Request Window	10-1
Overview.....	1
System Change Request Window Options	2
Steps for Creating a New SCR.....	3
Steps for Creating an SCR Configuration Change Order (CCO).....	7
Steps for Modifying or Deleting a CCO	9
SCR Forwarding Options.....	10
Steps for Supervisor SCR Forwarding	11
Steps for Requirements Review SCR Forwarding	13
Steps for Functional Analysis SCR Forwarding	14
Steps for Transfer of Control SCR Forwarding	16
Steps for Technical Analysis SCR Forwarding and Returning the SCR	17
Steps for Requirements Rewrite SCR Forwarding	18
Steps for Higher Authority SCR Forwarding	19
Steps for Initial/Final Impacting SCR Forwarding	20
Steps for Adding an SCR Attachment	21
Steps for Creating an SCR Amendment	24
Steps for Duplicating an SCR	26
Steps for Duplicating an Existing SCR Outside the Current AIS	28
Steps for Creating an SCR Relationship	30
Steps for Creating a PTR Cross-Reference.....	31
Steps for Creating/Modifying SCR Approval.....	32
Steps for Creating/Modifying SCR Notes	34
Steps for Entering a CCB Disposition	37
Steps for Entering Technical/Functional Analysis.....	37
Steps for Changing an SCR's Release Number/Target Release Number.....	39
Steps for Canceling an SCR.....	40
Steps for Reactivating a Canceled SCR.....	41
Steps for Deleting an SCR	42
Steps for Filtering SCR data	42
Steps for Sorting SCR's.....	44
Steps for Printing SCR Reports	45
 Chapter 11 Release Window.....	 11-1
Overview	1
Release Window Options	1
Steps for Creating a New Release	3
Steps for Attaching SCR's to a Release.....	4
Steps for Ranking SCR's Within a Release	6
Steps for Creating a Milestone.....	7
Steps for Creating a Dependency	9
Steps for Exporting Release Data to a Project Management Tool.....	10
Steps for Importing Release Data from a Project Management Tool	12
Steps for Filtering Release Data.....	13
Steps for Changing a Release Number.....	13
Steps for Locking a Release	14
Steps for Unlocking a Release.....	15
Steps for Creating a Release Baseline.....	16
Steps for Certifying a Release	17
Steps for Printing Release Reports.....	19

Chapter 11A Release Planning Window.....	11A-1
Overview	1
Standard Release Window Options	2
Release Planning Window Options.....	2
Steps for Attaching SCR's to a Planning Release	3
Steps for Migrating SCR's	5
 Chapter 12 Routing Inquiry Windows.....	 12-1
Overview	1
Routing Inquiries Options	1
Steps for Performing an SCR Routing Inquiry.....	1
Steps for Performing a CI TDR Routing Inquiry	3
Steps for Performing an SCR Testing TDR Routing Inquiry	5
Steps for Performing a System Testing TDR Routing Inquiry.....	7
 Chapter 13 Configuration Item Start/Deliver.....	 13-1
Overview	1
Configuration Item Start/Deliver Window Options.....	1
Steps for Delivering a CI Task	4
Steps for Redelivering a CI.....	6
Steps for Starting a QA CI	8
Steps for Printing CI Start/Deliver Reports	9
 Chapter 14 Release Management Processing Window	 14-1
Overview	1
Release Management Processing Window Options	1
Steps for Completing a Delivery	3
Steps for Rejecting a Delivery.....	5
Steps for Printing Release Management Processing Reports.....	6
 Chapter 15 CI Testing Window.....	 15-1
Overview.....	1
CI Testing Options.....	1
Steps for Starting a CI Testing Task.....	2
Steps for Testing a CI and Forwarding a CI Test.....	5
Steps for Creating a CI Test Deficiency Report (TDR)	10
Steps for Modifying a CI TDR	11
Steps for Deleting a CI TDR.....	12
Steps for Canceling a CI TDR	12
 Chapter 16 SCR Testing Window.....	 16-1
Overview.....	1
System Change Request Testing Window Options	1
Steps for Starting an SCR Test and Creating/Modifying an SCR Test Event.....	2
Steps for Creating/Modifying an SCR TDR.....	5
Steps for Forwarding an SCR TDR to the Testing Technical Action Manager.....	6
Steps for Testing AM Forwarding a TDR to the Development AM.....	8
Steps for Creating/Modifying SCR TDR Routing Data.....	8
Steps for Adding/Modifying SCR TDR CI's and Generating CCO's.....	10
Steps for Returning the SCR TDR to the Testing AM.....	13
Steps for Closing an SCR TDR	14
<i>Steps for Closing the Test Event and Ending the SCR Test</i>	<i>16</i>

Chapter 17 System Testing	17-1
Overview.....	1
System Testing Options.....	1
Steps for Creating/Modifying a System Test.....	3
Steps for Creating and Routing a System Test Event	5
Steps for Modifying a System Test Event	9
Steps for Starting a System Test.....	10
Steps for Creating a System Test Deficiency Report (TDR)	11
Steps for Modifying a TDR	13
Steps for Forwarding a System TDR.....	14
Steps for Creating/Modifying TDR Routing	16
Steps for Adding SCR's to a TDR, Identifying	17
Configuration Items, and Generating Configuration Change Orders (CCO's).....	18
Steps for Transferring Test TDR's Between Levels.....	21
Steps for Closing a TDR.....	23
Steps for Ending a System Test.....	25
Steps for Creating a System Testing Event Template.....	26
Steps for Creating a System Testing Level Template.....	28
Steps for Creating a New System Testing Event Using a Template	29
Steps for Creating a New System Test Level Using a Template	31
Steps for Printing System Test Reports	32
 Appendix A Glossary	 A-1
Appendix B Security Classification Settings (including Security Switches	B-1
Appendix C List of Reports and Their Purposes	C-1
Appendix D CMIS Oracle Views Oracle Views.....	D-1
Appendix E List of Routings and Inherent Privileges.....	E-1
Appendix F Business Rules	F-1
Appendix G External Interface Windows	G-1

CMIS User's Manual Organization

This manual provides users with information on using the CMIS application.

Conventions

This manual is divided into chapters, with most chapters corresponding to the main CMIS windows. Each chapter contains an overview, any restrictions to window access, and the options available from the window. For each window option, the detailed steps necessary to perform the option are provided, along with additional information for performing these steps. Accompanying graphics show you what your computer monitor should look like at various stages of the process under discussion. Several appendices to the manual provide ancillary information on CMIS.

Throughout this manual, formatting conventions make it easier for you to identify different types of information. **Boldface** text identifies window objects and specific data values that will display or that you will enter into the application. ALL CAPITAL letters indicate directory and file names. Keyboard key names appear in ALL CAPITAL letters. When you must press two keys simultaneously, the key names will be joined by a plus sign as in the following example: ALT+F4. For each main window, window objects are identified. Window objects include the buttons, fields, tabs, and other controls on the window.

Special text formats highlight different types of special information.

A **NOTE** indicates special information, such as window actions that cannot be undone or a restriction to the step under discussion. An example follows.

NOTE Only Configuration Manager and Technical Supervisor user types can create and modify TDR routing data.

A **Tip** provides helpful, ancillary information for the step under discussion. Tips provide nice-to-know information. An example follows.

Tip When the selected resource is a Release Manager, the Routing tab Members list will display all Release Managers for the current AIS. The Release Manager at the top of the list is the primary Release Manager while all others listed are alternate Release Managers.

Constraints

Explicit effort has been made to ensure that every graphic in this document is accurate and reflects the current version of the software; however, please note that the data displayed in these graphic images DO NOT represent actual or production data.

Trademarks

Any trademarks or registered trademarks referred to in the CMIS User's Manual belong to their respective companies and are hereby acknowledged.

Chapter 1 - Configuration Management and CMIS



Overview

This chapter addresses basic concepts behind configuration management (CM) and the Configuration Management Information System (CMIS). You will find these concepts helpful as you learn the detailed information about using the CMIS application. This chapter will not train you in how to apply CM principles to your daily work; nor will it instruct you in the mechanics of using CMIS. Rather, this chapter provides overviews of CM and CMIS, and may convince you that both will be beneficial as you do your job.

CM is a discipline to help software professionals manage the process of developing and maintaining software applications. CMIS facilitates the use of CM principles to develop, maintain, test, and document changes to software applications in a methodical, organized manner. This chapter addresses the various CMIS user roles and responsibilities, CMIS terminology, and the overall flow of data through CMIS. The chapter closes with CMIS system requirements and security features.

What is Configuration Management?

Configuration management (CM) is a discipline to apply technical and administrative direction and surveillance of changes to an automated information system (AIS). Thus, CM is the process and practice of identifying and controlling the many different components of an AIS. Computer systems typically are composed of many various parts and pieces. For instance, a typical system might contain computer source programs, help file source documents, operating system execution programs, installation programs, system documentation, and technical references. In a large AIS, there may be thousands of pieces that make up the system, while in a small AIS, there may be only a hundred.

Configuration identification of these various parts is the first and essential element of CM. Identifying, locating, controlling, and accounting for all the elements used to build an AIS is of prime importance in directing the software development process. In time, recording how these elements have been changed and by whom is valuable to the control of the process.

Configuration control of the changes to the identifiable elements of the AIS is another facet of CM. Good software does not happen simply by chance. Changes made to an AIS in a chaotic and unpredictable manner do not produce a high-quality product. A good understanding of the elements that need to change and who will change those elements is necessary.

Configuration status accounting is the ability to determine at any point in time the status of each configuration item in the AIS. This ability allows users to determine when a particular change was started, who is working on it, the estimated time before completion, and whether the change will be completed on time.

Configuration audit is the ability to audit, ensure consistency, and reconcile the differences between the physical and logical elements of an AIS. The determination of what software entities the developer presumed to change and those that were actually changed is an important part of CM. The importance of knowing what and when software elements were changed cannot be overemphasized.

Defense Finance and Accounting Service (DFAS) has developed a plan to solve what can be a chaotic software development process.

The DFAS Change Management Business Plan includes the following objectives:

- Provide a standard methodology of managing changes to application systems
- Identify and document the functional and physical characteristics of configuration items
- Control changes to the configuration item and supporting documentation
- Manage and control releases of operational software and documentation
- Provide management with a mechanism to manage a system change request (SCR)
- Record and report change processing and implementation status

Systems Engineering Organization Pensacola (SEOPE) developed the Configuration Management Information System (CMIS) several years ago. DFAS has adopted CMIS as the tool of choice to implement the DFAS Change Management Business Plan. CMIS is a Windows ® graphical user interface product with full Windows NT ® functionality, and is released only as a 32-bit software product. Please be aware that the configuration management of CMIS is accomplished using CMIS.

Why is Configuration Management Important?

Applying CM principles and practices to AIS development and maintenance provides the following benefits:

- A status of all requirements and the ability to track them through all development stages
- Releases and historical information concerning all incorporated requirements
- The ability to track all changes to the various software entities and to allow users to specify an estimated change size for each
- Statistics for functional and physical configuration audits
- Historical information on releases, requirements, and changes to the application over time
- Requirements management, which provides the following benefits:
 - A repository for all requirements
 - Consistency of products between engineering groups
 - Tractability of requirements to an application release because changes can easily be traced to the requirement
 - Tractability of amendments in requirements
- An organized testing process, which provides the following benefits:
 - Unit testing via quality assurance type configuration items (CI's)
 - Many levels of system integration testing
 - Creation and routing of test discrepancy reports (TDR's) that provide detailed information concerning problems identified during testing and valuable metrics on where improvements can be made.

What Does Configuration Management Cost?

As a “discipline,” CM costs what any other discipline costs. If an individual adheres to the principles and practice of CM, that person must make the effort to understand the principles and take the time to install the practice. It does not matter what software is being used for CM. It does not matter what software is being used for the physical control of software entities. What does matter is compelling one's self to adhere to the generally accepted principles of CM. Like the athlete who must train daily to reach the pinnacle of fitness, we must also train ourselves to accept and use the principles of CM in our daily business of software development.

The price is often high. Most of us would rather not exercise discipline. Usually, it is easier to develop software without someone looking over our shoulders. It takes time. It takes effort. It is not easy, but it is required.

To produce consistent, high-quality software, we need to follow in principle those actions that help produce consistency and quality. We must practice those actions in our daily work habits. Often, we must change. We must change not only the software we develop but also the way we develop that software. As we grow and learn new methods to enhance the development process, we must be willing to exercise the discipline to implement those methods when they have proven to be beneficial. We must often change to meet the demands of the exacting, highly technical development process.

Discipline is the key word. It comes with a price: effort, change, time, and money. The costs can be high. However, the rewards will be even higher.

Configuration Management Information System (CMIS)

CMIS is the DFAS tool of choice to help facilitate CM within an organization. There must be an underlying process and procedure articulating the CM process to implement fully the principles and practice of CM. Without the managerial and working level commitment to practice configuration management, CMIS will only prove to be a burden. CMIS cannot be the managerial tool it has been designed to be unless it is used and supported.

CMIS supports the following DFAS Change Management Business Plan objectives:

- CMIS tables allow users to define and identify configuration items (CI's) within user-defined types. When completed, these tables represent the AIS operational baseline. The tables are updated as changes are made to the AIS.
- Customers, Higher Authorities, and Operations and Development personnel enter SCR's directly into CMIS. These SCR's are approved by electronic signature. SCR's are routed for requirements definition, functional and technical analysis, initial and final impacting, and to higher authorities when necessary.
- Releases are created in CMIS with scheduled start and implementation dates. SCR's are selected and assigned to a release. CMIS supports the exporting and importing of tasking and resource data to and from a project management tool. Microsoft ® Project is the only tool currently used by CMIS for this purpose. After the release schedule is approved by the AIS managers, it is locked in CMIS.
- Usually, developers can only start tasks in CMIS after the release is locked. There are exceptions to this rule for those tasks that need to be in place when development starts, for example, functional analysis. CMIS tracks the start and delivery dates of functional, technical, and testing tasks in a release. Early or late starts or deliveries can be reported. CMIS tracks work that must be redone because it did not pass testing.
- A release is certified after all tasks in the release are completed. CMIS produces a Certification Report to be approved by all applicable system development managers. This report is sent to Release Management (RM). It is RM's authorization to release the configuration items and update the baseline libraries. When the Certification Report is sent to Configuration Management, the release is certified and considered closed in CMIS.
- CMIS has a library of reports and inquiries that provide statistical information, status data, management, and ad hoc reports.

CMIS Roles and Responsibilities

There are several roles a user can assume while using CMIS. Within each role is a predefined set of actions a user role can perform. Additionally, a Security Classification can tailor these actions by further restricting what users may be entitled to do. Consider these roles as a way of dividing the labor within the team that develops and maintains an AIS.

Usually, the software development process involves both a functional and a technical organization. The functional organization specifies and defines both the requirements and the functional specifications, and is usually a DFAS Center. The technical organization creates the software product, and is usually an Information and Technology Activity or a System Engineering Organization. Within CMIS, both the functional and technical organizations are supported.

Because CMIS maintains a separation between the functional and technical, certain roles must be duplicated for the functional and technical organizations; thus, there are Functional Change Coordinator (FCC) and Technical Change Coordinator (TCC) roles. Their functions are similar in that they both coordinate the software change process, but only within their respective organizations.

CMIS User Role	Description and Responsibilities
Change Coordinator (Technical or Functional) (TCC/FCC)	Responsible for the change process Coordinates all facets of the change process from creating releases, routing all SCR's to the appropriate Action Managers for work, project management using a project management tool, and tracking work in progress On a large AIS, this role may be one full-time person or several part-time people. On smaller projects, this role may be performed in combination with another role.
Action Manager (Technical or Functional)	Is usually, but does not have to be, a supervisor Capable of assigning work to be done by another person, such as an Employee Denotes a person who can direct work (action) to be done but not necessarily be the supervisor of record for that worker Reviews and approves the work of others
Change Coordinator/ Action Manager (Technical or Functional)	A role that integrates the Change Coordinator and Action Manager roles Can perform the actions of each role without having to switch between roles in CMIS
Employee (Technical or Functional)	Usually a person responsible for performing work, which can include developing a requirement, doing functional analysis, writing the program code or job control procedure, or testing code Can receive work requests from an Action Manager and informs that Action Manager when work is completed

CMIS User Role	Description and Responsibilities
Configuration Manager (CM)	<p>Usually responsible for overseeing the software development process</p> <p>Usually an oversight role as this user type is not generally involved in the day-to-day development process, and as such, the CM's ability to perform certain CMIS functions is greater than that of the FCC or TCC.</p> <p>While the TCC is capable of performing all functions necessary to create and build releases, there are certain functions that only the CM can perform, such as removing an SCR from a locked release or unlocking a release.</p>
CMIS Administrator	<p>Also referred to as the CMIS, System, or Technical Supervisor</p> <p>One or more persons responsible for administering CMIS for a given instance of the database (A database instance can contain CMIS files for many AIS's.)</p> <p>This role alone is responsible for establishing AIS's, creating and modifying security classifications, creating user accounts, assigning user roles, changing system parameters, and troubleshooting problems.</p> <p>Responsible for understanding almost every facet of CMIS. This role can perform every function of every other role.</p>
Remote User	<p>User type with a very limited scope</p> <p>Can enter, electronically route, and review SCR's</p> <p>While "remote" could imply an isolated processing location, this is not necessarily the case. It is primarily intended for users who only need limited access to CMIS.</p>
Higher Authority	<ul style="list-style-type: none"> • Usually at a management level higher than the development organization • Has decision authority to approve SCR's for a release that exceed a certain spending threshold • Establishes the SCR threshold value on an AIS-by-AIS basis
Release Manager (RM)	<ul style="list-style-type: none"> • Usually responsible for maintaining the source, object, and executable libraries for an organization • Tasked with generating and releasing the executable software to field organizations • Acts as an intermediary between development and quality assurance personnel • Usually responsible for compiling and furnishing to quality assurance the executable code to test

Because most organizations use a similar management approach, with a few people usually assigning work and overseeing its accomplishment, CMIS uses a hierarchical approach to the AIS development process. In CMIS, either the FCC or the TCC oversees the development process for their respective organization for any given AIS. The FCC or TCC assigns work to Action Managers who can assign the work to an Employee under their purview. Because work is assigned from a TCC or FCC to an Action Manager to Employee, approvals flow up from Employee to Action Manager to Change Coordinator. CMIS fully supports multiple levels of Action Manager authority and matrix management of Action Managers to Employees.

Functional Organization	Technical Organization
<ul style="list-style-type: none"> • Usually a DFAS center • Is particularly responsible for the requirement definitions and the functional analysis • Functional analysts write requirements to define the problem and functional requirements to indicate a solution to the problem • Performs functional acceptance testing on the system prior to implementing the release into production 	<ul style="list-style-type: none"> • Usually a DFAS Information and Technology Activity or a System Engineering Organization • Is particularly responsible for programming and other technical work necessary to implement the requirements and functional analysis • Technical work tasks can include program or database changes and updating documentation and installation routines to implement the changes • Performs technical acceptance testing on the system prior to functional acceptance testing
<ul style="list-style-type: none"> • In both the functional and technical organizations, there is a need for Action Managers, Employees, and Change Coordinators. Please remember that from the CMIS standpoint, the two organizations are logically distinct and unique. The CMIS Administrator is responsible for establishing the organizational hierarchy in CMIS. 	

Based on the separation of the functional and technical organizations in CMIS, the FCC cannot assign work to anyone in the technical organization and the TCC cannot assign work to anyone in the functional organization. In CMIS, there is usually no means of communicating work requirements from one organization to the other except by transferring that work to the other organization. Only TCC's and FCC's can transfer work between organizations. After such a transfer, the receiving Change Coordinator has control of the transferred work until returning it to the other organization. For example, the FCC cannot assign a technical Employee to perform work on a SCR. In addition, an FCC cannot assign a functional Employee to perform work on an SCR unless the FCC owns the SCR. The functional organization users cannot view the specific individual tasks of the technical organization users.

CMIS Processing

CM is based on the premise that change is the only thing in our lives that does not change. It has been said that change and thus, growth, is the only barometer of life. As such, all of our AIS's are very alive. As developers, we must manage that change. As systems grow to maturity, they encounter many, varied, and often substantial changes. The management of those changes is embodied in a discipline called life cycle management (LCM). One of the principal elements of LCM is CM.

This section will present some basic CMIS terminology that will be helpful in the ensuing scenario illustrating the typical flow of data in CMIS, from the creation of an SCR through a release. Keep in mind that CMIS maintains a separation between the technical and functional organizations. Refer to the previous section on CMIS Roles and Responsibilities if you need a refresher on CMIS roles and descriptions.

CMIS Terminology

Configuration Items (CI's)

CI's are the individual elements of a software system. Each CI must be identifiable and is usually whole rather than part of another entity. CI's can be almost anything, including computer programs, job control language programs, database schemas, help file source documents, installation instructions, and technical reference manuals. CI's are a way to organize the work involved in developing and maintaining an AIS. The CI ID should be descriptive. For example, the programming CI's should have the same name as the item names in the library. A technical documentation CI should have a name descriptive of its purpose, such as **CMIS User's Manual**. CI's also can be functions that users must perform to facilitate the capture of all "work" necessary to implement an SCR in an AIS.

Configuration Item Types

A CI type identifies a general category of CI's. CI's are entered into CMIS using a CI type identifier and a CI identifier. A CI type ID is two characters and descriptive enough to indicate its purpose. For example, **HE** could indicate help files and **PR** could indicate programming source code. Try to use a logical naming scheme to make it easier for users who will follow in your footsteps.

Configuration Change Orders

A configuration change order (CCO) is a task someone must perform to accomplish a change in an AIS, and is the authority for someone to perform some action or function to accomplish work on a CI. In simplest terms, in CMIS a CCO is a CI coupled with the name of the person who will actually do the work on the CI. For historical recording purposes, a CCO also will record the date the work was started and completed as well as the estimated and actual amount of time used to complete the task. Having these dates associated with the CCO allows CMIS to determine what work needs to be performed, what work is late, and when specific work tasks should be completed. CMIS uses this CCO data to generate reports to help manage large software development efforts. There may be hundreds of CCO's attached to an SCR.

System Change Requests (SCR's)

The heart of CMIS is the SCR. It is the core unit of all change processing. As such, most CMIS actions are based on the SCR. An SCR may be necessary due to a change in a business practice, law or policy, technology, or it simply may be an enhancement. An SCR is a collection of information necessary to facilitate a developer's ability to make the change and a tester's ability to validate the change. In the old days, an SCR was created on paper and forwarded through appropriate channels. Today, SCR generation is electronic. As system changes are made and implemented, the accumulation of SCR's records the historical modifications to the system.

Releases

DFAS has stated that software be distributed in a "release." A release may be a complete and entire distribution of every software entity in source libraries or it may be just a single element of an AIS. At a minimum, a release contains at least one SCR. At a maximum, a release may contain hundreds of SCR's. The size of a release depends on its type. DFAS suggests that releases be made quarterly. However, there are also unplanned releases, such as emergency releases. An emergency release is a quick way to distribute software to fix a problem in the field that prevents an AIS from performing some necessary function for which there is no workaround.

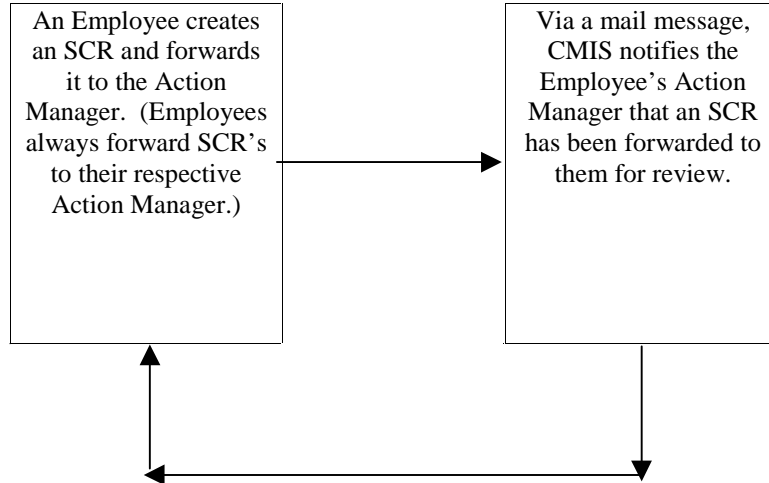
Configuration Control Board (CCB)

Who determines what gets changed in an AIS? For systems of any size, it is usually the AIS's configuration control board (CCB). A CCB meets occasionally to determine which SCR's are necessary for the continued success of the AIS. CCB members weigh not only the scope and necessity of each SCR but the cost as well.

SCR Process Flow

Processing begins with the generation of an SCR. Of course, for users to generate SCR's, they must have CMIS installed and have the necessary passwords. Remote Users, Employees, and Action Managers typically create SCR's in CMIS with precursory information, such as a Requirements Definition. In this example, an Employee will create an SCR.

SCR Initial Entry



SCR Initial Entry

- In this example, an Employee created the SCR so forwarding must be to that Employee's Action Manager.
- At this point, the SCR has a temporary status, and the Employee who created the SCR or the Employee's Action Manager can delete it.
- The SCR is not considered permanent yet because it may not be valid for one reason or another. If it is not permanent, the appropriate user can delete it before further processing occurs.
- Employee and Action Manager user roles are not responsible for overseeing the software development process. If no further action is taken with the new SCR, it will not become part of the release.
- After initial entry, the user who created the SCR needs to forward it up to the next level using the CMIS forwarding option. Remember that CMIS follows a hierarchical method for accomplishing work. For example, Action Managers forward SCR's either to one of their respective Employees or to their change coordinator.
- As in this example, an Employee always forwards SCR's to their Action Manager. The Action Manager reviews the SCR for accuracy and validity. Depending on this review, the Action Manager can forward or delete the SCR. After an SCR is assigned a number, that number is never assigned to another SCR.
- If the Action Manager determines the SCR is invalid or inaccurate, the Action Manager can forward the SCR back to the Employee for more work. CMIS generates a mail message informing the Employee of the forwarding action. This forwarding from the Action Manager to the Employee can occur as many times as necessary to ensure the validity and accuracy of the SCR. The SCR will continue to be temporary until the Action Manager forwards it to a Change Coordinator.

SCR Forwarding for Analyses and Requirements

If finding the SCR acceptable, the Action Manager forwards the SCR to the Change Coordinator. (Only Action Managers can forward to Change Coordinators.)

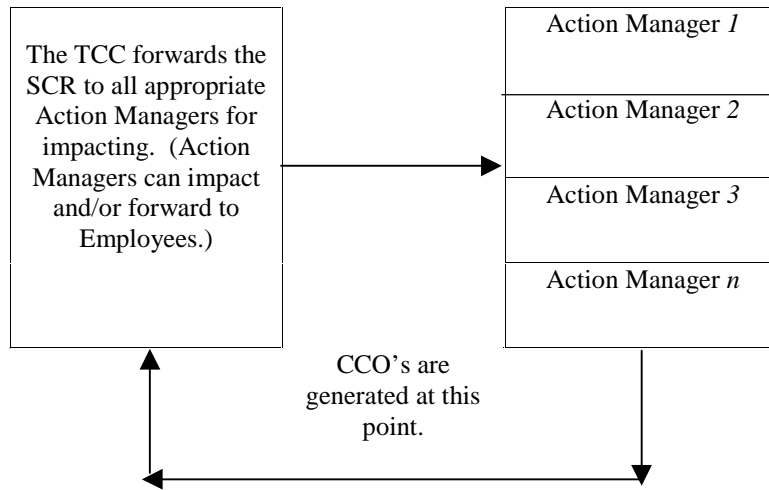
If the Action Manager forwarded the SCR to an Employee for technical analysis, the Employee returns (forwards) the SCR to the Action Manager after the technical analysis.

SCR Forwarding for Analyses and Requirements

- If the Action Manager determines the SCR, forwarded from the Employee who created it, to be valid and accurate, the Action Manager can forward it to a Change Coordinator. When the Action Manager forwards the SCR to a Change Coordinator, CMIS generates a mail message informing the Change Coordinator of the forwarding action. If the SCR is not permanent, when the SCR is forwarded to a Change Coordinator, it becomes permanent and never can be deleted, although it can be canceled.
- Change Coordinators coordinate and control the processing and flow of all SCR's in CMIS. In this context, "work" refers to the various analyses and tasks necessary to incorporate the SCR into the production environment; examples of tasks include programming, updating documentation, and testing. When CMIS sends a message indicating a Change Coordinator has an SCR to review, the Change Coordinator must determine the nature of the SCR, the work the SCR requires, and who will do that work.
- The FCC is responsible for ensuring the completion of the requirements definition and functional analysis for a pending SCR. The functional requirement is a broad overview of how to solve the problem. In other words, it describes how the changed element(s) should operate when the SCR is implemented and, as such, does not involve the technical details of how to effect the change(s). When the requirements definition and functional analysis have been completed, the FCC forwards the SCR to the TCC for action. When the FCC forwards the SCR to the TCC, control of the SCR transfers from the functional organization to the technical organization.
- The TCC is responsible for ensuring the completion of the technical analysis, identifying the parts of the system that need to change, identifying who will make those changes and how long it will take, creating a release, and assigning one or more SCR's to it, locking the release so developers can start development, tracking those changes during development to determine progress, and certifying that the release is complete and ready for implementation.
- A Change Coordinator forwards the SCR to the appropriate Action Manager, usually for a particular purpose. For example, the TCC could forward the SCR to the programming shop Action Manager for technical analysis. When this action occurs, CMIS generates an appropriate message to the programming Action Manager. The Action Manager can do the technical analysis or forward the SCR to one or more Employees for technical analysis.
- If an Action Manager forwards the SCR to an Employee for action, the Action Manager is still responsible for the work. After completing the technical analysis, the Employee returns the SCR to the Action Manager for review. Again, the Action Manager either can send the SCR back to the Employee for rework or return the SCR to the Change Coordinator.
- CMIS maintains a log of all routings for historical purposes. For example, the Change Coordinator's SCR to the Action Manager generates a routing record. In addition, the SCR forwarding from the Action Manager to the Employee generates a routing record. CMIS stores the names of the SCR sender and receiver, the reason for the routing, the routing creation and completion dates, whether the recipient accepted or rejected the routing, and any notes the recipient deems necessary.

Thus far, you have followed the SCR from creation through its routing to fill in the analyses and requirements blanks but the SCR still requires impacting. In CMIS, impacting is the process of determining the configuration items that will change, who will change them, and how long it will take to make the changes. Both technical and functional personnel can perform SCR impacting.

SCR Impacting



SCR Impacting

- The Change Coordinator routes the SCR's that require impacting to the appropriate Action Manager(s). There are two SCR impacting routings: initial and final. The difference between the two is based on the status of the SCR when all routings are completed.
- During impact routing, Action Managers and Employees generate CCO's by determining exactly which CI's require changes, who will make the changes, and how long the work will take.
- CMIS automatically maintains the total time necessary to complete the SCR.

Now that the SCR has been fully impacted, the CCB members can weigh not only the scope and necessity of each SCR, but also the cost of each. If each SCR is fully impacted, then the total cost of the SCR's included in the release can be determined. Usually, the cost of a release is expressed in terms of labor hours but this value easily can be converted to dollars. Both the CCB and the AIS development team must agree on the AIS changes to be made and the cost of making those changes. When they do, they sign an agreement; this agreement essentially is a contract that indicates a given number of changes for a given price.

Until this agreement with the CCB has been made, all CMIS work on the next release has been tentative. Now that the developers have an agreement, work can begin on the release in earnest. At this point, the TCC finalizes the release by including in the release only the SCR's agreed upon by the developers and the CCB. Developers generally are not going to start work on a release until they have a contract. A contract implies that each side has agreed to perform some predefined function to fulfill the contract. To make the agreed upon changes more permanent, CMIS provides an operation called "locking" a release. Only certain user roles can lock a release. Usually the TCC locks the release. Release locking allows developers to start work on their CCO's. Locking the release also changes the way SCR's get assigned to the release; for details on how locking a release affects SCR assignments to a release, refer to Chapter 11, Release Window.

Developers Start Their CCO's

Actual work begins when developers start their CCO's. When a developer starts a CCO, CMIS sends a message to the Release Manager (RM), who is usually responsible for controlling the software libraries. The RM copies the respective CI to a predetermined network folder location. In some cases, the RM e-mails the CI to the appropriate developer(s). Developers modify the CI as prescribed by the SCR. When the developer has completed all changes and they are ready for testing, the developer uses CMIS to deliver the CCO. The delivery action generates a message to the RM, who copies the modified CI to a working location, compiles it if necessary, and forwards the CI, if necessary, to testing personnel.

Testing

Testing begins when testers, who usually are Employees, begin testing the work the developer has done. There are three types of testing in CMIS: configuration item, system change request, and release system testing. CI testing involves testing only the changed CI without any supporting program. While CI testing is useful, it tests only one element of a software system and nothing else. SCR testing tests a part of the system to ensure all requirements of the SCR have been met. Release testing tests the entire system as a whole to ensure the system performs every designed function. If testing reveals a problem, the tester documents the problem in a test discrepancy report (TDR). A TDR usually generates one or more rework CCO's. The developer assigned to a rework CCO starts and delivers the CCO, the RM copies the appropriate files to the desired location, and testing starts again. This cycle is repeated until the tester finds no problems.

Certifying the Release

When all development and testing has been completed, the release can be implemented. First, the release must be certified. Usually, release management requires that all appropriate departments verify that the release is ready for distribution. In other words, all involved parties must certify that their part of the release has been completed and is ready to be placed in production. They must certify that they are ready, and in CMIS, this is called "certifying" the release. Usually, the TCC or the Configuration Manager performs this function but release management personnel also can certify releases. It is one of the final steps in developing software.

The release is installed in production. Everyone holds their breath and hopes that all goes well.

Oh No! A PTR

Occasionally, a problem slips through the cracks. A customer calls reporting a production problem. Most organizations have a trouble or help desk to field calls from the production user community. Problems reported from help desk calls often can be traced to a fault not associated with the program; many times, these problems can easily be fixed during the call. When a trouble call is identified as a fault with the AIS, a program trouble report (PTR) will result. A PTR defines a problem identified in a production rather than a testing environment. Developers scurry to discover the source of the problem. If it can be fixed without a program change, it is. If not, then someone has to generate an SCR, assign it to a non-scheduled release, and quickly make the necessary changes.

Requirements for Using CMIS

Hardware CMIS requires a DFAS Standard Windows NT Workstation.

Software CMIS requires a Windows NT Operating System as well as 32-bit SQL*Net and TCP/IP.

Security

CMIS access is password-protected. This protection provides both access and functional security. Functional security is defined as access to some system functions but denial of others. For example, a user can be authorized to add a CCO, but not permitted to change an SCR. User class and password assignments are under the control of the CMIS Administrator. In addition, CMIS controls update access to SCR's based on the SCR's status in the approval or implementation process. For example, update authority can be available only when a SCR has been routed to a user.

To access the CMIS, a user must log on to CMIS with a valid CMIS User ID and password.

Chapter 2 - Introduction to the CMIS Application



Overview

The Configuration Management Information System (CMIS) computer application runs in a Microsoft Windows NT© environment. Windows applications share certain conventions that make them easier to use than non-Windows or DOS (disk operating system) applications. For example, CMIS lets you have more than one application window open at the same time. Having more than one window open simultaneously is handy because you can switch back and forth between windows that contain related data. Multiple open windows also allow you to copy and paste text from one window into another. Another feature of Windows applications is the consistent use of menus on a menu bar. Becoming familiar with these conventions will help you learn how to use CMIS.

This chapter addresses the appearance, windows, and controls that let you navigate your way through the CMIS application. For information on the CMIS menus, buttons, keyboard and mouse inputs, and standard window controls that let you make selections and initiate application processes, refer to this chapter. This chapter also discusses several CMIS windows that are not associated with any specific process window. These windows include the Login, CMIS Help, How Do I?, Release Notes, About CMIS, Change Preferences, Print Options, and Printer Setup windows. You also will find information on how to contact the CMIS Help Desk.

Tip A useful resource for additional information on Windows and its associated terminology is the Windows NT© Help file. To open the file select the taskbar **Start** button, then select **Help**.

CMIS Startup



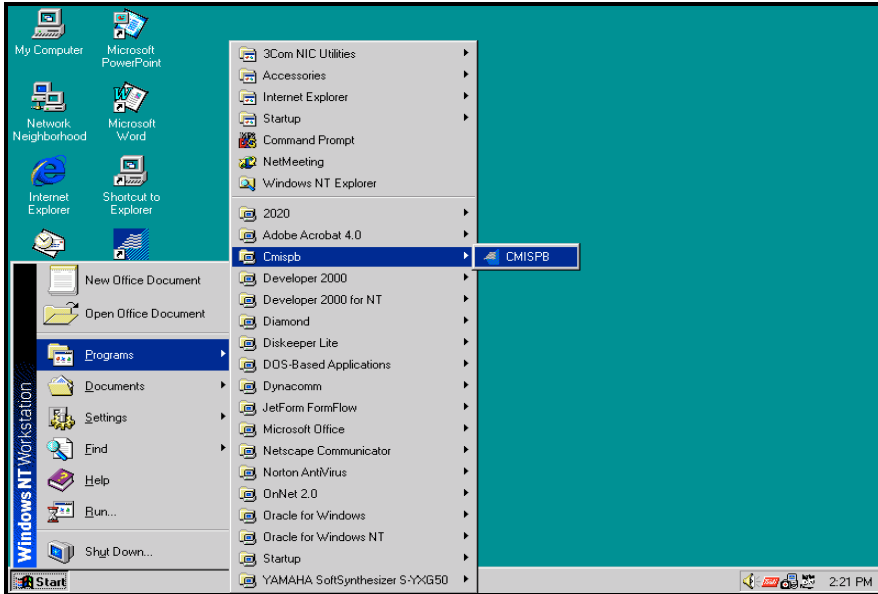
Overview

Users gain access to the CMIS application via the login window. If you have more than one assigned automated information system (AIS) or user type, you must select the desired AIS and user type on the AIS selection and user assignments window. If you have only one assigned AIS or user type, CMIS automatically will make this selection for you.

Restrictions

- To log into the CMIS application, you must be established as a Resource in CMIS.

To start the CMIS application select **Start, Programs, Cmispb**, and then **Cmispb** again.



The CMIS login window will open.

■ Steps for Logging in and Selecting an AIS/User Type

After you start CMIS, the Login window will open. CMIS automatically will provide values for the **Location** and **User ID** fields based on the values you used the last time you logged into CMIS.

1. Verify that the **Location** and **User ID** values are correct.

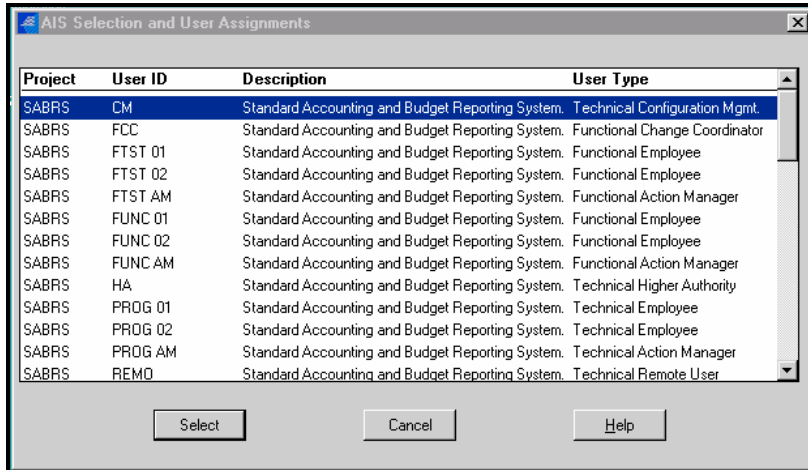
If the displayed **Location** is incorrect, select the desired value from the **Location** drop-down list. If the displayed **User ID** is incorrect, enter the appropriate value.

A screenshot of the 'CMISPB Login' dialog box. The window has a blue title bar with the text 'CMISPB Login'. Inside, there are three input fields: 'Location' with a dropdown menu showing 'Cleveland', 'User ID' with the text 'JJOHNSON', and 'Password' with a masked field showing 'xxxxxxxx'. Below these fields, it says '3 Attempts Remaining'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Help'.

2. Enter your **Password** in the **Password** field.
3. Select the **OK** button.

If you enter your password incorrectly, a message will inform you of your error. You have three chances to enter your password correctly. After the third incorrect attempt, a Login Error window will direct you to contact your CMIS Administrator.

After a successful login, the AIS Selection and User Assignments window will open if you have more than one assigned automated information system (AIS) or User Type in CMIS.



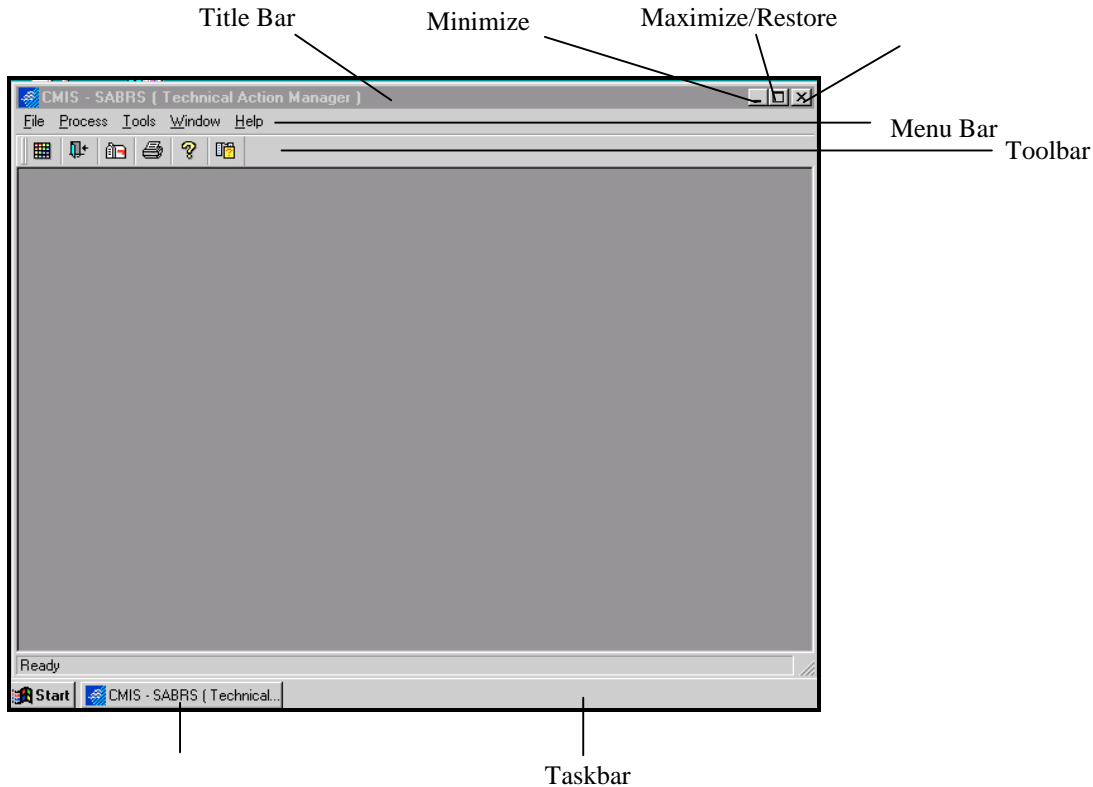
This window allows you to select the desired AIS and User Type for your CMIS session. If you have only one assigned AIS and User Type, CMIS automatically recognizes your assigned AIS and User Type and you will not see the AIS Selection and User Assignments window.

4. If the AIS Selection and User Assignments window opens, select the desired AIS and User Type, then select the **Select** button.

NOTE Later in this chapter, you will see how to change AIS's and User Assignments for your CMIS session (providing you have more than one AIS or User Type assignment) via the Preferences window.

Main CMIS Window

Following a successful login (and an AIS and User Assignment selection), the main CMIS window will open. When CMIS opens, the Windows NT© taskbar will contain a **CMIS** button.



Title Bar

On the main CMIS window, also called the application frame, the title bar identifies the title of the CMIS application and the AIS and User Type selected after logging in. The title bar also contains three buttons in the upper right corner: the **Minimize**, **Maximize/Restore**, and **Close** buttons.

The **Minimize** button will clear the CMIS window from your display. The CMIS application will continue to run when minimized. When minimized, the presence of the **CMIS** button on the taskbar lets you know the application is still running. To restore CMIS to its previous size, click on the CMIS taskbar button.

If the CMIS window is not maximized, the **Maximize/Restore** button will make the CMIS window as big as it can be. If the CMIS window is not maximized, the **Maximize** button will appear as a single square representing a window. If the CMIS window is at its maximum size, the **Maximize** button will appear as two, overlapping windows. Selecting the **Maximize** button when the display is already as large as possible will change the display to its previous size.

Every CMIS window has a title bar. When you select the **Maximize**, **Minimize**, or **Close** button on a CMIS window other than the main window, the selected button action will apply to the currently active window. For example, if you select the **Close** button on the System Change Request window, the System Change Request window will close although the CMIS application will remain open.

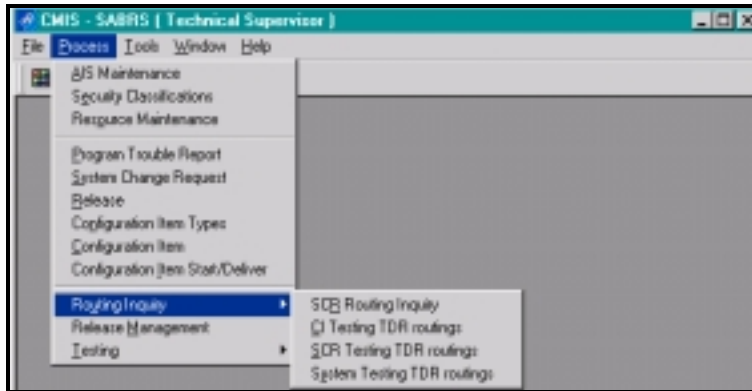
The **Close** button on the main window will close the **CMIS** application. Do not select this **Close** button unless you're sure you wish to terminate **CMIS**.

Menu Bar

The menu bar contains the main CMIS menus. Select a menu by clicking on it or by typing its access key. The access key for each menu is the underlined letter in the menu label. For example, on the **F**ile menu, the underlined **F** indicates you can enter ALT+F on your keyboard to open the **F**ile menu. With the **F**ile menu open, select from the menu by clicking on the desired item or by typing the desired item's access key. For example, you can select the **F**ile menu **E**xit item by clicking on it or simply by typing **x**.

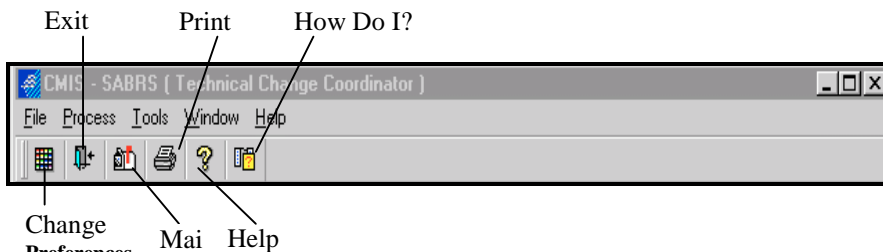
When you open CMIS, the menu bar contains five menus: **File**, **Process**, **Tools**, **Windows**, and **Help**. When you open another window, additional menus may appear on the menu bar and their contents may change. The menus and their contents depend on the active window, your user type and security class, and the status of the displayed data.

Some menu items contain special symbols that provide more information about the item. A menu item with a triangular arrow (►) indicates that the item contains a submenu. A submenu contains one or more related items; for example, the Routing Inquiry submenu contains four items for opening the different Routing Inquiry windows. A menu item followed by an ellipsis (...) indicates that a command will execute after you provide additional information. For example, if you select **Print...** from the **File** menu, you must designate what and how you wish to print before the actual print command will execute. Also, some menu items provide the keyboard alternative to the menu command. For example, the **File** menu **Exit** item indicates the keyboard alternative for **Exit** is ALT+F4.



Toolbars

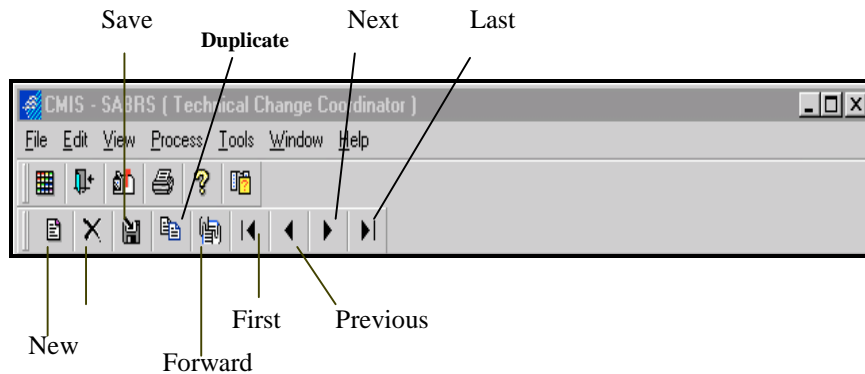
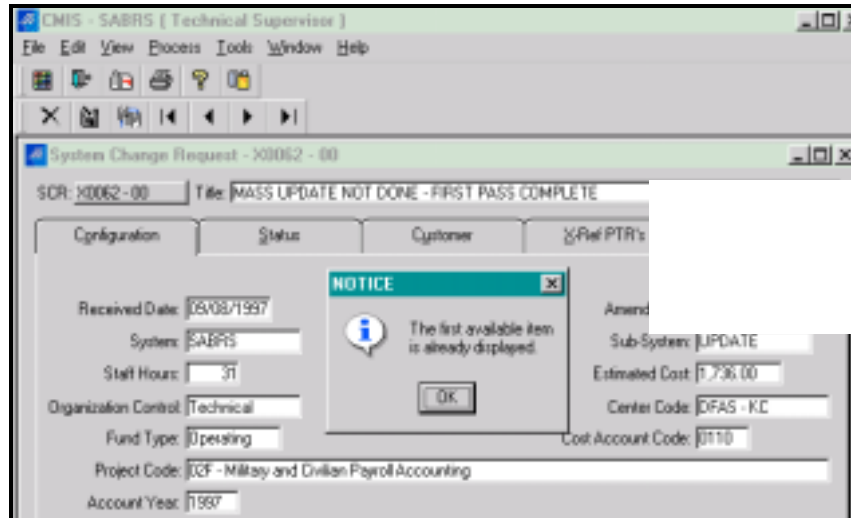
There are two CMIS toolbars: one associated with the application frame (main window) and the other associated with the current open window. The buttons that appear on the application toolbar will depend on your CMIS access rights. The application toolbar buttons provide shortcuts to various menu items. For example, you can open the Print Options window by selecting **Print** from the **File** menu, but it's quicker simply to click on the **Print** toolbar button.



The toolbar buttons default to pictures-only but you can change the display of the buttons by selecting **Toolbar Text** from the **Window** menu. If you move your mouse cursor over a toolbar button, its tooltip will display. A tooltip is a concise description of a graphic window control. Additionally, with the cursor over the button, microhelp in the status bar at the bottom of the window displays a description of the button.

Application Toolbar Button	Function
Change Preferences	Opens the Change Preferences window, allowing you to select a different AIS and user account, if you have the appropriate access
Exit Application	Closes the CMIS application
Mail	Opens the Internal Mail System window
Print	Opens the Print Options window
Help	Opens the CMIS help file
How Do I?	Opens the How Do I? window

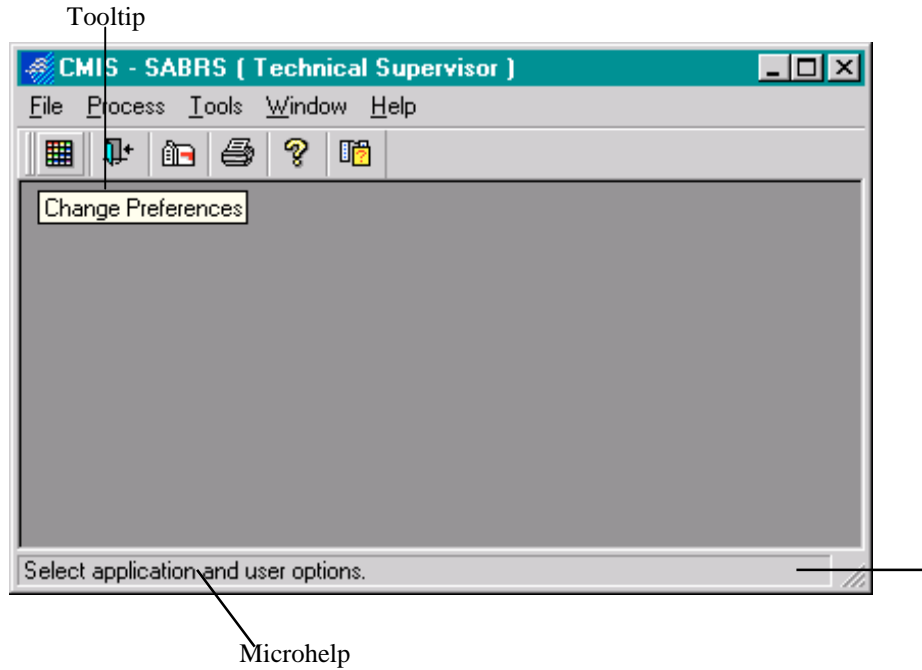
The buttons that appear on the window-specific toolbar depend on your CMIS access rights, the window(s) you have open, and the status of any displayed data. If you select a toolbar button that is temporarily unavailable, a message will provide the reason the button is inactive. For example, if you have selected the first row of data and click on the **Previous** button, a message will remind you the first available row already is displayed.



The window-specific toolbar buttons vary, depending on the window that you have opened. The window-specific toolbar shown in Figure 2-8 contains **New**, **Delete**, **Save**, **Duplicate**, and **Forward** buttons. The equivalents of these buttons can be found on the **File** and **Edit** menus. The sample toolbar also includes the VCR buttons **First**, **Previous**, **Next**, and **Last** to move window focus to the first, previous, next, and last accessed data records. These commands are also available from the **View** menu.

Status Bar

The very bottom of the main CMIS window contains the status bar. The status bar keeps you informed of the status of the application and provides "microhelp." Microhelp provides information specific to the location of the window cursor. For example, if you move the cursor over the **Change Preferences** toolbar button, the tooltip for the button will display and microhelp will display a brief description of the button.

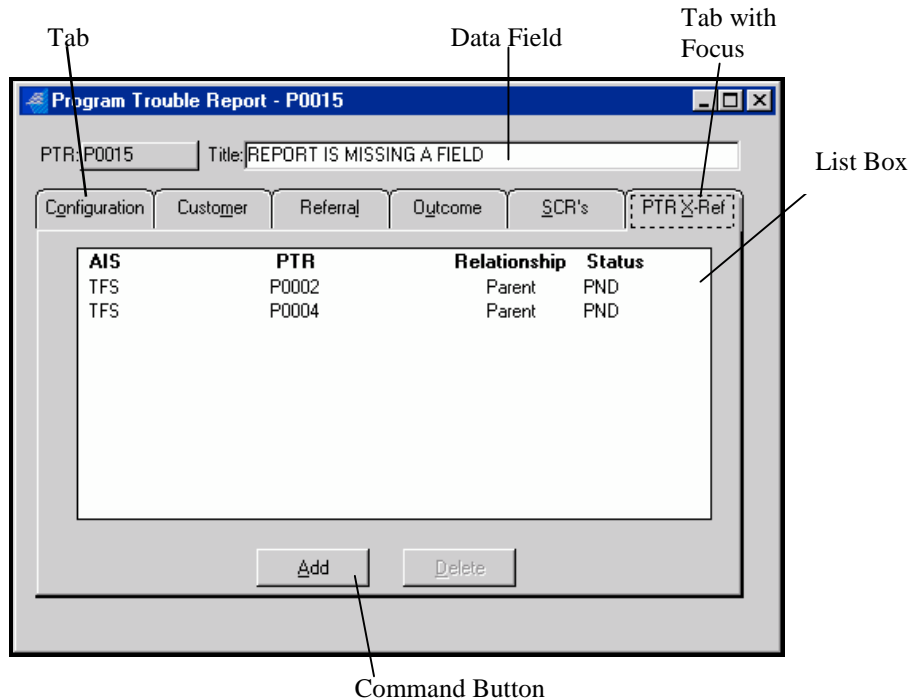


Window Focus and Controls

“Focus” is the current location of the window’s attention. Focus can be in a data field, a window title, a menu, on a button, or on a line of data in a list box. The focus of the window will be highlighted in some manner. For example, in a list box, the data row that has focus will be highlighted with a colored bar. When a button, such as the **OK** button, has focus, a dotted line will surround the button label.

A window control essentially is any object on the window that you can view, alter, or select. Window controls include command buttons, toolbar buttons, data fields, radio buttons, check boxes, and list boxes.

The Program Trouble Report window contains several different types of window controls.



Many CMIS windows employ tabs. window tabs are similar to the tabs in a drawer of file folders. Tabs allow similar types of information to be grouped together, and each tab has a label to indicate the type of information it contains. The Program Trouble Report window contains six tabs. When a tab has focus, it will contain a dotted rectangular line. When focus is on one tab, you can shift focus to another tab by clicking on the desired tab or using the keyboard arrow keys.

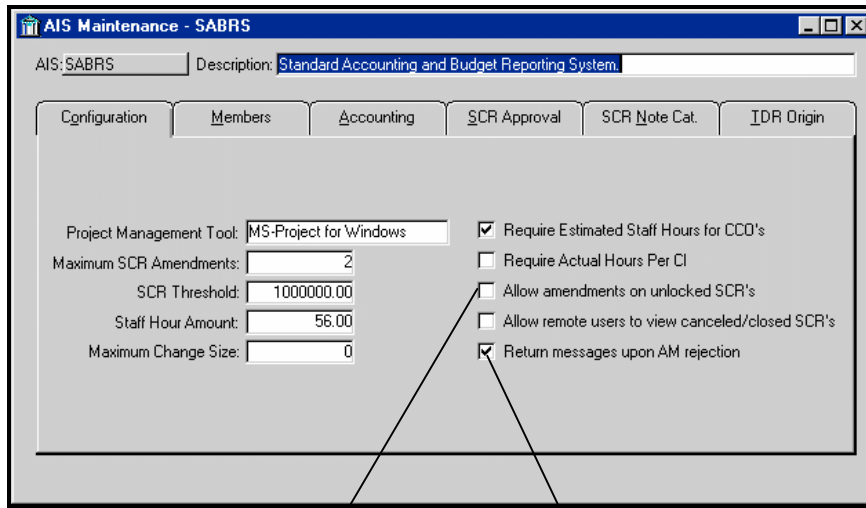
A list box is another type of window control. A list box contains one or more rows of data. To make a choice from a list box, you can select the desired row using your mouse or, if focus is already on a row of data, the arrow keys. If the rows of data extend past the visible area of the list box, use the vertical scroll bar or arrow keys to scroll down and up the list.

Windows controls include several types of buttons. A command button is a standard Windows control that initiates a command or sets an option. The Program Trouble Report window **PTR X-Ref** tab has two command buttons: **Add** and **Delete**. When a command button has focus, it will contain a dotted rectangular line. You can select a command button by clicking on it, or, if focus is already on the button, by pressing the ENTER key. When a command button is unavailable, it will be grayed out.

Another type of button is the radio button. Radio buttons offer a mutually exclusive choice: only one radio button can be enabled at a time. To select a radio button, click on it. Refer to Figure 2-17 for radio button examples.

A data field is an edit field where a user can enter and edit data. User access to modify values in data fields depends on the user's type and security class, and the status of the displayed data. When a data field has focus it will contain a flashing cursor. You can select a data field by clicking on it. With focus on a data field, you can right-click to access a pop-up menu of editing commands.

A check box is another type of window control. A check box displays a setting, either enabled (checked) or disabled (not checked). Unlike radio buttons, you can have more than one check box enabled at a time. Enable or disable a check box by clicking it. You can also change the check box by shifting window focus to the check box and pressing the SPACEBAR.



Disabled Check Box Enabled Check Box

After you open a CMIS window, you can move focus around the window and manipulate window controls via the mouse or equivalent keyboard command. For example, when the Program Trouble Report window opens, focus defaults to the **PTR** field. You can shift focus to the next logical field by using the TAB key. With focus on **PTR**, TAB will shift focus to the **Title** field. You can also move focus by clicking on the desired item. SHIFT+TAB moves focus in reverse order.

CMIS will not allow you to TAB to or click on any data field for which you do not have update access.

The function keys, usually running along the top of your keyboard, perform various commands in CMIS. For example, with CMIS running, if you select SHIFT+F1 the CMIS help file will open. CTRL+F4 will close the currently active window, and if you wish to exit CMIS, execute ALT+F4.

Function Key	Function
SHIFT+F1	Opens the CMIS help file
CTRL+F4	Closes the currently active window
ALT+F4	Closes the CMIS application

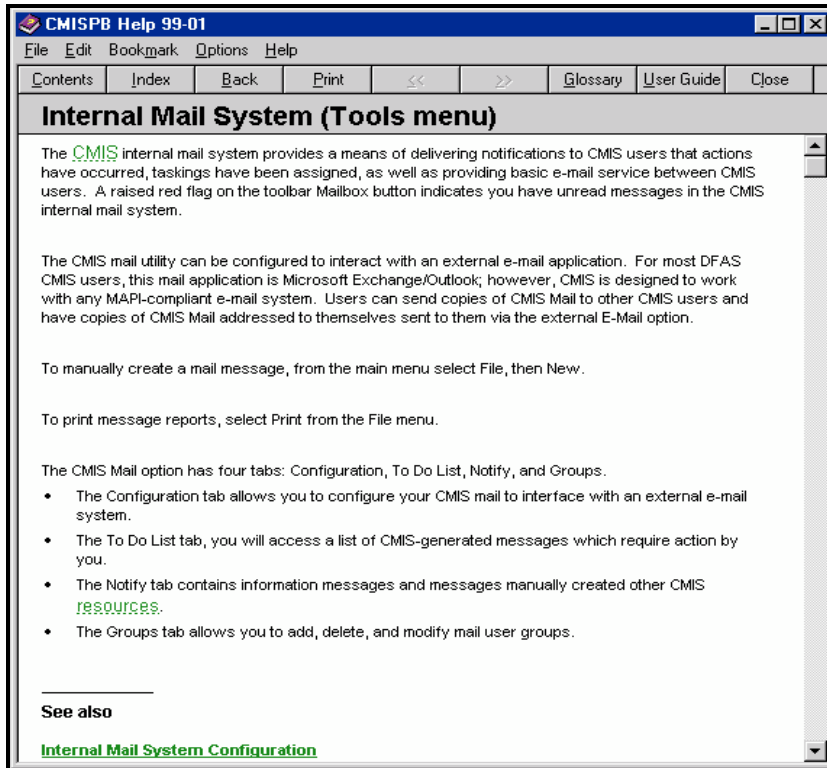
The CMIS application uses a consistent interface to make it easier for you to use. When you add, update, or delete data, you'll find a consistency in the use of buttons, menus, and window appearance. When you want to add a new data record, you begin the process in the same way. For example, from the System Change Request window you can start the creation of a new SCR by clicking on the **New** toolbar button; the same is true for a new PTR: with the Program Trouble Report window open, click on the **New** toolbar button to begin creation of a new PTR.

Using CMIS Help

The CMIS application features reference help, How Do I? help, and the CMIS On-Line User's Guide.

Reference Help

Reference help opens when you select the **Help** menu **Contents** item or click on the toolbar **Help** button. You also can open help by pressing SHIFT+F1 key. On response windows where you cannot access the CMIS menus and toolbars, a **Help** command button lets you access help.

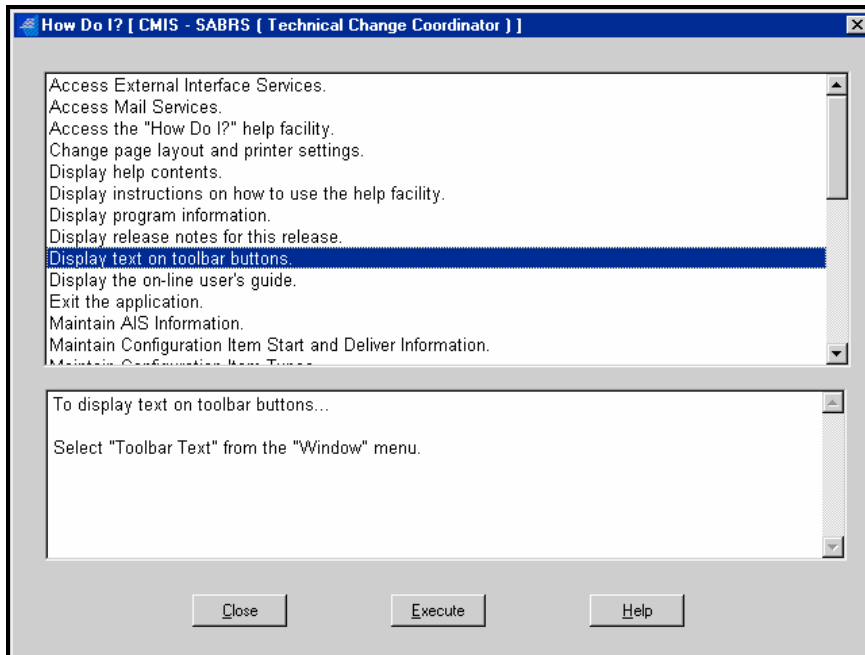


Refer to CMIS Help when you need information on the functions of a window, the length and composition of window data fields, whether a data element requires an entry, and any user access restrictions to the window. When you open CMIS Help, the topic that displays depends on the window from which you accessed help. Most help topics offer jumps to related help topics. Jumps to other topics are in green, underlined text. Glossary terms are green, with a dotted underline. When you select a glossary term, the definition appears in a pop-up window.

The buttons at the top of the help window can assist you in navigating help. To access the main help contents, select the **Contents** button. To search for a specific help topic, select the **Index** button. If you have jumped from one topic to another while using help, when you select the **Back** button, you will return to the last topic you accessed. You can continue selecting the **Back** button until you reach the first topic you accessed in the help session. The **Glossary** button opens the CMIS glossary help file, which contains terms specific to the CMIS application. The **User Guide** button opens the CMIS On-Line User's Guide. The **Close** button closes the CMIS help window.

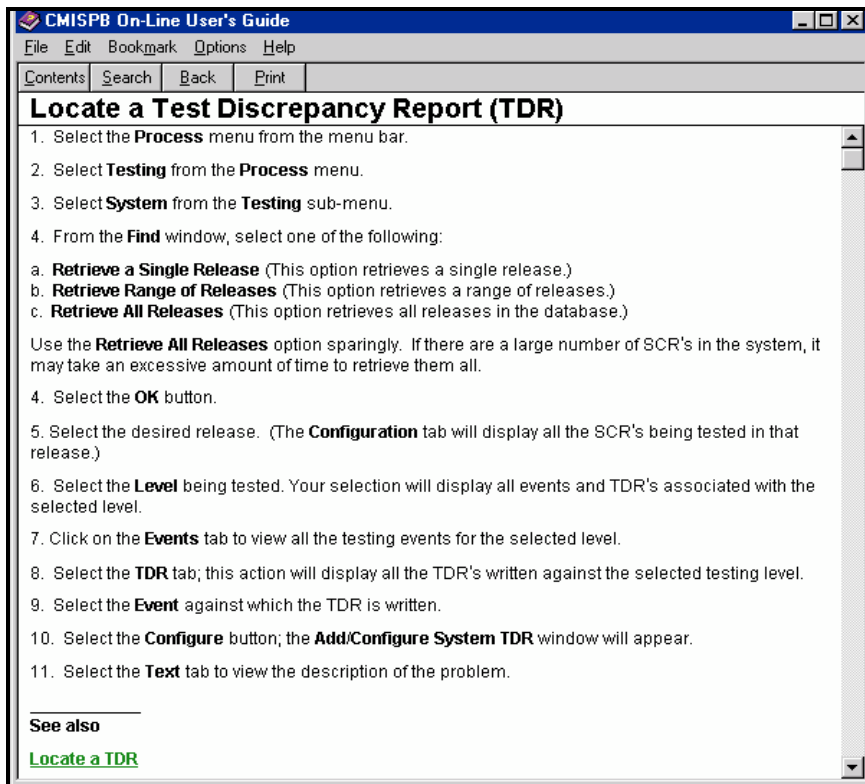
How Do I? Window

The How Do I? window provides you with additional help on common CMIS tasks. Select the desired task from the list in the top window and the bottom window will display the actions required to perform the selected task. A special feature of How Do I? help is the **Execute** button. Select the desired task from the list in the upper window, then select the **Execute** button; CMIS will perform the selected task for you.



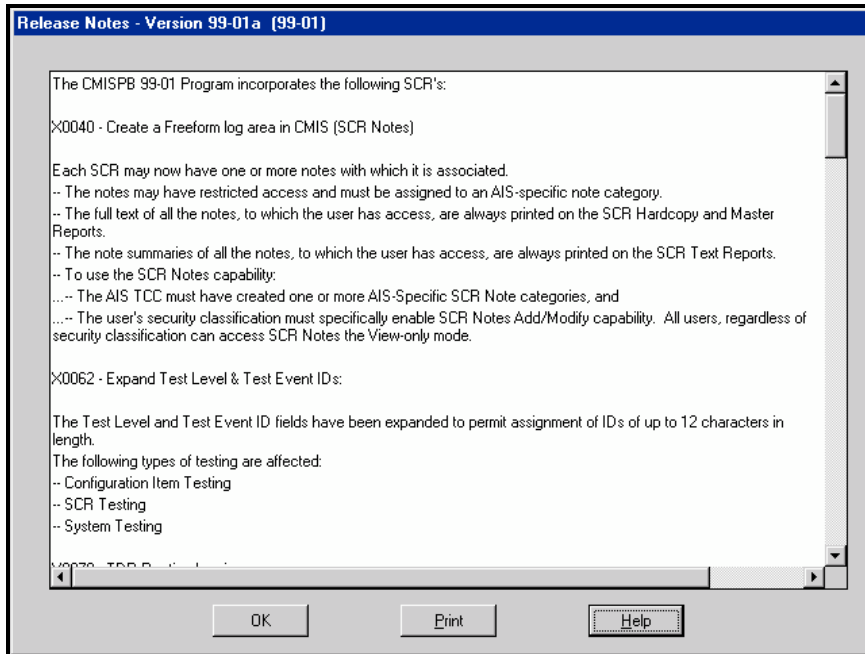
On-Line User's Guide

The On-Line User's Guide provides step-by-step instructions for certain CMIS functions for specific user types. Currently, the On-Line User's Guide contains information for Action Managers and Employees only.



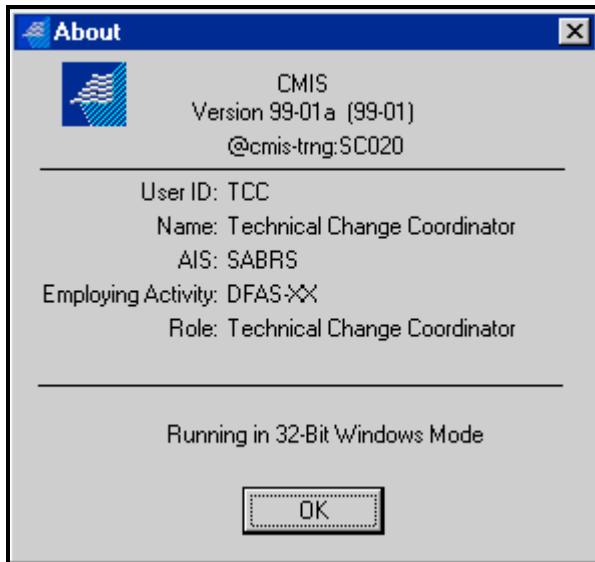
Release Notes Window

When a new version of the CMIS application is released, the release is accompanied by a text file that describes the SCR's that have been incorporated into the new version of CMIS.



About Window

The About window provides you with information on the CMIS application you are using, your user status, and your computer system. The top two lines of text identify the CMIS application by title and version.



Preferences Window



Overview

Use the Preferences window to change the AIS and User Type you used when you logged in for your current CMIS session. You also can use this window to change your CMIS User Account.

Restrictions

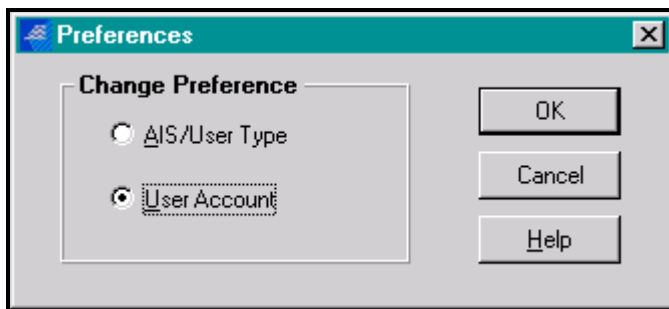
- To change your AIS/User Type or User Account, you must have access to more than one CMIS AIS/User Type or User Account.

Open the Preferences window by selecting the **File** menu **Preferences** item or the **Preferences** toolbar button.

■ Steps for Changing Preferences

1. Select the **Preferences** toolbar button or the **File** menu **Preferences** item.

The Preferences window will open.



2. To change your AIS and User Type for the current CMIS session, click on the **AIS/User Type** radio button.

If you have only one assigned AIS and User Type in CMIS, the AIS/User Type radio button will be disabled.

3. To change your CMIS User Account, click on the **User Account** radio button.
4. Select the **OK** button.

The User Account option allows you to log into CMIS with a different User ID. If you select the **User Account** button, then select **OK**, the CMIS Login window will open. If you have multiple user ID's, enter the desired ID in the **User ID** field, enter the associated password in the **Password** field, then select the **OK** button.

If you do not have multiple user ID's, simply enter your password at the Login window and you will reaccess CMIS as usual. If you select the **Cancel** button on the Login window at this point, you will close CMIS and have to restart it.

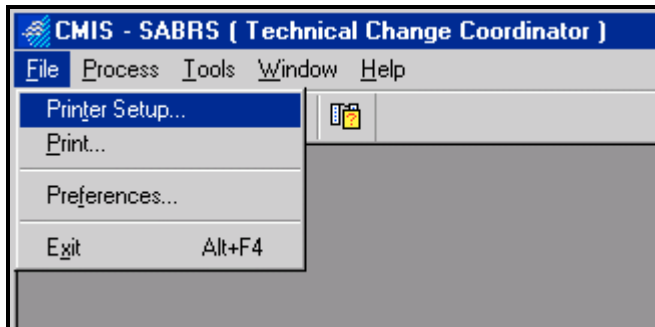
Printer Setup Window



Overview

You can change the printer selection and print options from the Printer Setup window.

The Printer Setup window opens from the **File** menu.



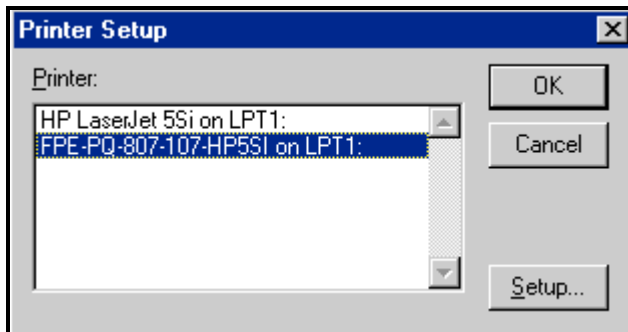
Restrictions

- Access to view and print CMIS reports depends on the user's Security Classification.

■ Steps for Changing Printer Settings

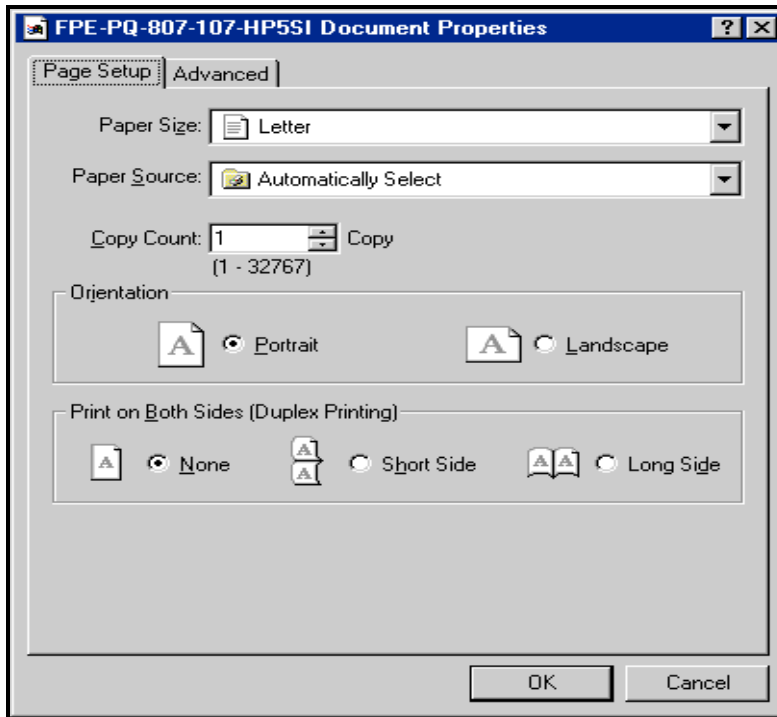
1. Select **Printer Setup** from the **File** menu.

The Printer Setup window will open.



2. Select the desired printer from the **Printer** list box.
3. If desired, select the **Setup** button to change document and printer properties.

The Document Properties window for the selected printer will open.



4. Select the desired tab and print options. The window defaults to the **Page Setup** tab.
5. Select the **OK** button to close the Document Properties window.
6. On the Printer Setup window, select the **OK** button to close the window.

Print Options Window



Overview

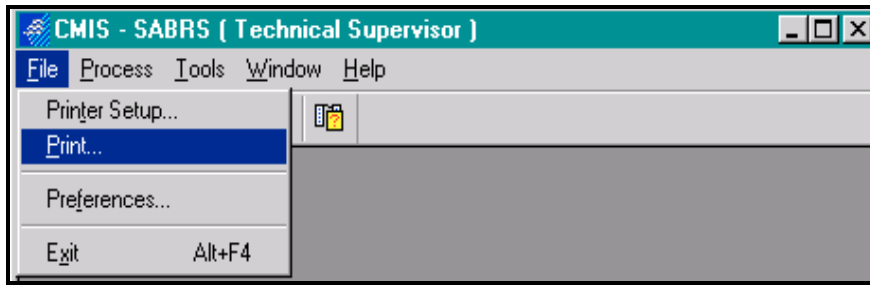
CMIS features a variety of reports authorized users can view and print. When you select the **Print** toolbar button or the **File** menu **Print** item, the Print Options window opens. On the Print Options window, you can view the reports available in CMIS, preview a selected report prior to printing it, print the desired report, or save the report as a text file.

When you wish to view or print a CMIS report, it is important to note that you should filter the report data prior to printing it, if a filter is available for the selected report. Never print a report without first defining at least one filter condition. Failure to specify a filter condition can result in at least one of the following problems:

- a printout of the entire database
- the display of illogical data
- a delay of several hours while the application retrieves, sorts, and formats the report data, if a large database is involved. After you close the Filter window and select the **Preview** or **Print** button, the report generation process begins. Because this process runs on the database server, you cannot terminate it until the report is ready for viewing or printing.

Because setting a filter condition is so important, the Filter window will open automatically when you try to print or preview a selected report.

Open the Print Options window by selecting **Print** from the **File** menu



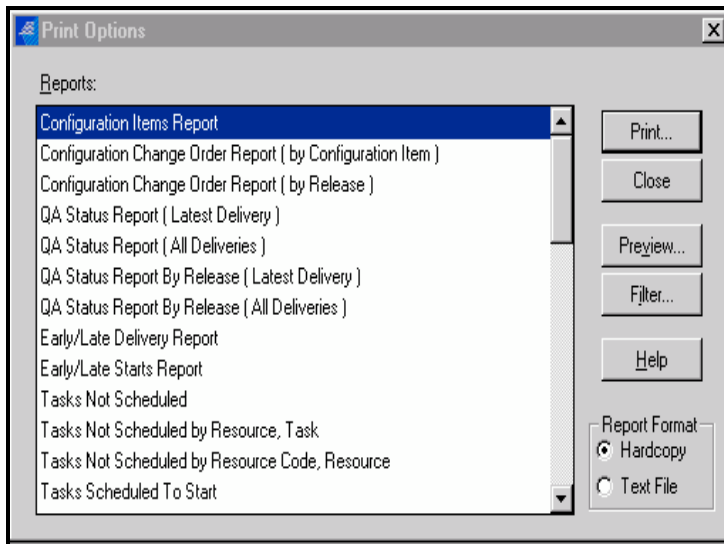
Print Preview Window Options

- **Filter, preview, and print a report**

Steps for Filtering, Previewing, and Printing a Report

1. Select the **Print** toolbar button.

The Print Options window will open.



2. Select the desired report from the **Reports** list.
3. If you wish to save the report as a text file, select the **Text File** radio button.

NOTE If you select the **Text File** radio button, CMIS will prompt you for a file name for the text file.

4. Select the **Filter** button to define required report filter conditions.

Note The Filter window also opens automatically if you select the Print Options window **Print** or **Preview** button without having set any filter conditions.

The Filter window will open. The contents of the Filter window depend on the selected report.

Field	Filter Condition	Filter Value
Configuration Item Type	= Equal	DC
Configuration Item	Not Filtered	N/A
Responsibility Code	Not Filtered	N/A
Destination Code	Not Filtered	N/A
Location	Not Filtered	N/A
Document ID	Not Filtered	N/A
Deliverable	Not Filtered	N/A
Modify on Unlocked SCR	Not Filtered	N/A

Apply Filter

☐ No Filter
 ☐ Any of These
 ☒ All of These

- For each report column you wish filtered, select the desired filter condition from the drop-down list on the left, and then enter the desired value in the corresponding data field on the right.

For example, suppose you wanted to filter the Configuration Items Report to include only CI's with a Configuration Type of **DC**. To set this filter condition, select = **Equal** from the **Configuration Item Type** drop-down list, then enter **DC** for the Configuration Item Type value. Setting this filter condition will filter out all CI's other than CI type **DC** from the Configuration Items Report.

- Select the desired **Apply Filter** radio button.

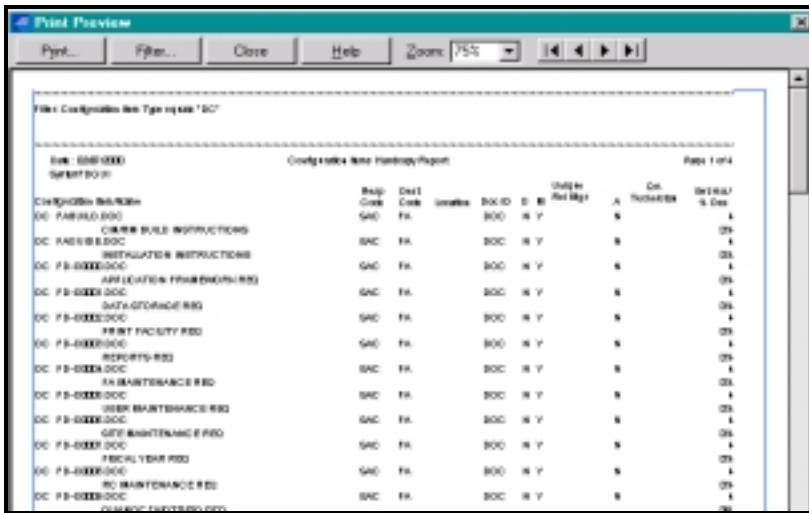
To filter the report with any defined filter conditions, select the **Any of These** radio button. To filter the report by all defined filter conditions, select the **All of These** radio button. If you select **All of These** and the report does not meet all the filter conditions, an empty report will result. The **No Filter** radio button removes all filters from the report; usually, you must specify filter conditions for the report and will not select the **No Filter** button.

- After defining the filter condition(s), select the **OK** button.

After you select **OK**, the Filter window will close. You can now print or preview the filtered report.

- If you wish to see how the report will look before actually printing it, select the **Preview** button.

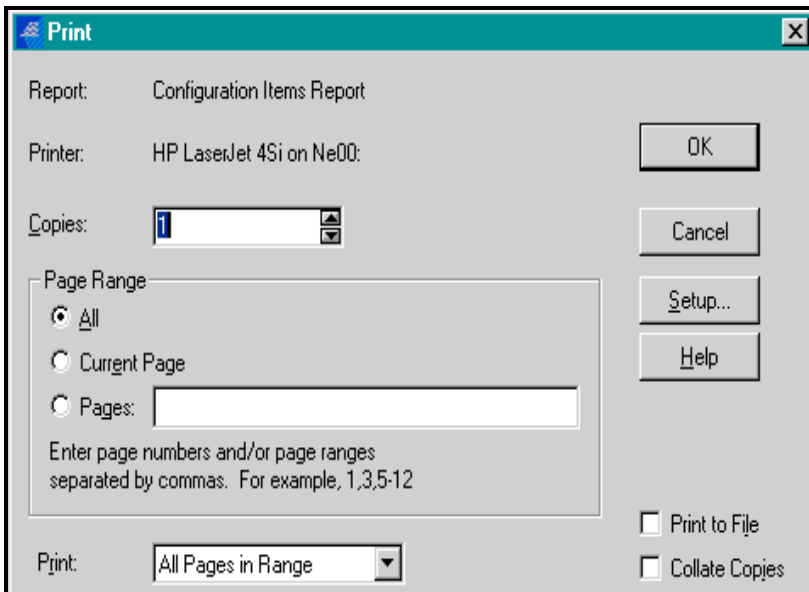
The Print Preview window will open.



The Print Preview window lets you review the appearance of the selected report prior to printing it. Select the **Filter** button if you want to change the report's filter conditions. To change the magnification percentage of the displayed report, select a different value from the **Zoom** drop-down list. If the report has more than one page, use the **First**, **Next**, **Last**, and **Previous** buttons to page through the report.

9. If you're satisfied with the appearance of the displayed report, select the **Print** button to print the report.

After you select the **Print** button, the **Print** window will open.



10. To print more than one copy of the report, change the value of the **Copies** field.
11. Select the desired **Page Range** radio button depending on whether you wish to print the full report, the currently displayed page, or a range of pages.
12. To start printing the report, select the **OK** button.
13. Select the **Close** button to close the Print Preview window.

Contacting the CMIS Help Desk

When you need assistance using CMIS, or if you encounter a hardware or software problem you cannot resolve, contact the CMIS Help Desk via telephone or e-mail. Remember that for most users, the first step in getting CMIS assistance is contacting your supervisor or CMIS Administrator. Please note that CMIS Help Desk support is geared towards CMIS Administrator user types.

**CMIS Operations Help Desk
Defense Finance and Accounting Service (DFAS)
Systems Engineering Organization (SEO)
Pensacola, Florida**

Commercial: (850) 452-2990 extension 314
DSN : 922-2990, extension 314
E-Mail Address: CMIS.OPERATIONS.SUPPORT@DFAS.MIL

CMIS Help Desk personnel primarily support CMIS Administrators, and are available via telephone weekdays 0700 – 1600 central time. Outside of the normal Help Desk hours, use voice mail or e-mail to leave a message. A CMIS analyst will call you to discuss your problem or question.

Chapter 3 - CMIS User Types and Common Tasks



Overview

The access rights of CMIS users vary widely based on user type and security class. This chapter organizes the most common CMIS tasks into tables based on user types. These tables have two purposes: to provide CMIS users with an overview of their responsibilities and to point users to the desired CMIS User's Manual chapter for detailed steps to accomplish their work. Each table begins with a heading identifying the user type. The left column identifies the window (and corresponding User Manual chapter number) from which the task is launched, while the right column identifies the tasks. To use this information, locate your CMIS user type table. For detailed task steps, locate the referenced chapter.

CMIS User Types and Their Most Common Tasks

Common Tasks: All CMIS User Types		1 of 2
CMIS Window	Tasks	
Resource Maintenance (Chapter 4)	<ul style="list-style-type: none">Change CMIS password	
<ul style="list-style-type: none">Internal Mail System (Chapter 6)	<ul style="list-style-type: none">Maintain external e-mail linksChange internal interval for checking for new mailRead To Do List mail messagesRead Notify mail messagesDelete mail messageMaintain mail message groupsGenerate and send a mail messageForward a mail messageGenerate a mail report<ul style="list-style-type: none">Mail Viewed Notification Hardcopy ReportMail Unviewed Notification Hardcopy ReportMail All Notification Hardcopy ReportMail Viewed To Do Hardcopy ReportMail Unviewed To Do Hardcopy ReportMail All To Do Hardcopy Report	
<ul style="list-style-type: none">Various	<ul style="list-style-type: none">Generate a CMIS report	

Common Tasks: All CMIS User Types		2 of 2
CMIS Window	Tasks	
<ul style="list-style-type: none">• Various (Chapter 2)	<ul style="list-style-type: none">• Access CMIS help contents• Access CMIS help index• Obtain How Do I? help• Obtain information concerning who you are logged on as, the version of CMIS you are using, and the database you are using via the About window• View CMIS Release Notes	

Release Management User Type		1 of 1
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> Configuration Item Types (Chapter 8) 	<ul style="list-style-type: none"> Create a new configuration item (CI) type Modify an existing CI type Delete an existing CI type View all existing tasks (CCO's) that reference a CI type View existing open tasks (CCO's) that reference a CI type Generate Configuration Hardcopy Report 	
<ul style="list-style-type: none"> Configuration Items (Chapter 9) 	<ul style="list-style-type: none"> Create a new CI Modify an existing CI Delete an existing CI Specify the automatic generation of test and evaluation CCO's for the CI View all existing tasks (CCO's) that reference a CI View existing, open tasks (CCO's) that reference a CI Make mass change to CI's Generate Configuration Items Report 	
<ul style="list-style-type: none"> Release Management Processing (Chapter 14) 	<ul style="list-style-type: none"> Process a CI start View all CI deliveries View only my CI deliveries Complete (accept/process) a CI delivery Reject a CI delivery <ul style="list-style-type: none"> Hard reject (CI is invalid) Soft reject (CI source code date is invalid) View processed CI deliveries Generate pending CI deliveries Generate processed pending CI deliveries 	
<ul style="list-style-type: none"> Release (Chapter 11) 	<ul style="list-style-type: none"> Generate dBase 4 file types containing data from the Oracle database <ul style="list-style-type: none"> Selectively choose data based on release certification Select all data 	

Technical/Functional Employee User Type		1 of 6
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> • Program Trouble Report (Chapter 7) 	<ul style="list-style-type: none"> • Record a problem (PTR) detected in the production version of an automated information system (AIS) • Refer the PTR for analysis and resolution • Record a resolution for the PTR • Generate an SCR from the PTR • Specify an existing SCR that resolves the problem identified in a PTR 	
<ul style="list-style-type: none"> • System Change Request • System Change Request Part Two (Chapter 10) 	<ul style="list-style-type: none"> • Submit a change for an AIS (create a new SCR) • Electronically route/forward SCR • Perform duties assigned from Action Manager <ul style="list-style-type: none"> • Requirements rewrite • Functional analysis • Technical analysis • Requirements review • Initial impacting • Final impacting • Specify tasks (CCO's) necessary to accomplish the SCR • Delete an SCR • Create an SCR amendment • Specify an existing PTR (problem) that the SCR will resolve • Create/Modify/Delete an SCR attachment • Create/Modify/Delete an SCR note • Generate an SCR report <ul style="list-style-type: none"> • SCR Hardcopy Report • SCR Approvals Report • SCR Workload Report • SCR Listing Report • SCR Master Report • SCR Text Report • Rejected SCR Approvals Report 	
<ul style="list-style-type: none"> • Release 	<ul style="list-style-type: none"> • Specify dependencies between CCO's (tasks) to be performed within the release • Break dependencies between CCO's (tasks) to be performed within the release • Create milestones within the release 	

Technical/Functional Employee User Type		2 of 6
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> Configuration Item Start/Deliver (Chapter 13) 	<ul style="list-style-type: none"> Specify the beginning of development work for a CI Specify the completion of development work for a CI Specify the beginning of test and evaluation work for a CI Generate CI Start/Deliver Reports <ul style="list-style-type: none"> Configuration Change Order Report by Configuration Item Configuration Change Order Report by Release 	
<ul style="list-style-type: none"> Routing Inquiry – SCR Routings (Chapter 12) Release (Chapter 11) 	<ul style="list-style-type: none"> Specify SCR approvals filtering criteria View all SCR approvals within the filter criteria specified View open SCR approvals within the filter criteria specified Open System Change Request Part Two window from SCR Approval Inquiry Generate SCR approval reports <ul style="list-style-type: none"> SCR Approval Inquiry Report SCR Rejected Approvals Report 	
<ul style="list-style-type: none"> CI Testing TDR Routing Inquiry (Chapter 12) 	<ul style="list-style-type: none"> Specify CI testing TDR routings filtering criteria View all CI testing TDR routings within the filter criteria specified View open CI testing TDR routings within the filter criteria specified Open SCR Part Two window from the CI Testing TDR Routing Inquiry window View the TDR of the CI testing TDR routing Generate CI Testing TDR Routings Report 	
Technical/Functional Employee User Type		3 of 6
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> SCR Testing TDR Routings (Chapter 12) 	<ul style="list-style-type: none"> Specify SCR testing TDR routing filtering criteria View all SCR testing TDR routings within the filter criteria specified View open SCR testing TDR routings within the filter criteria specified Open SCR Part Two window from the SCR Testing TDR Routing Inquiry window View the TDR of the SCR testing TDR routing Generate SCR Testing TDR Routings Report 	

<ul style="list-style-type: none"> • System Testing TDR Routings (Chapter 12) 	<ul style="list-style-type: none"> • Specify system testing TDR routings filtering criteria • View all system testing TDR routings within the filter criteria specified • View open system testing TDR routings within the filter criteria specified • Open System Change Request Part Two window from the System Testing TDR Routing Inquiry window • View the TDR of the system testing TDR routing • Generate System Testing TDR Routings Report
<p align="center">Technical/Functional Employee User Type 4 of 6</p>	
<p>CMIS Window</p>	<p>Most Common Tasks</p>
<ul style="list-style-type: none"> • CI Testing (Chapter 15) 	<ul style="list-style-type: none"> • View CI deliveries <ul style="list-style-type: none"> • Deliveries unprocessed by release management • Deliveries with open quality assurance (QA) tasks • All deliveries • View CI testing details • Maintain testing levels <ul style="list-style-type: none"> • Add a testing level • Start a testing level • Complete a testing level • Delete a testing level • Maintain testing deficiency report (TDR) <ul style="list-style-type: none"> • Create a new TDR • Route a TDR • Identify the SCR for the TDR • Identify the CI's on the SCR for the TDR • Generate CCO's on the SCR • Delete a TDR • View the QA CCO's for the CI test • View the SCR's for the CI test • Generate CI testing reports <ul style="list-style-type: none"> • Configuration Item Test Hardcopy Report • QA Status Report (Latest Delivery) • QA Status Report (All Deliveries) • QA Status Report By Release (Latest Delivery) • QA Status Report By Release (All Deliveries)

Technical/Functional Employee User Type		5 of 6
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none">• System Change Request Testing (Chapter 16)	<ul style="list-style-type: none">• View SCR tests• Maintain testing events<ul style="list-style-type: none">• Add a testing event• Start a testing event• Complete a testing event• Delete a testing event• Maintain testing deficiency report (TDR)<ul style="list-style-type: none">• Add a testing TDR• Route a TDR• Identify the CI's on the SCR for the TDR• Generate CCO's on the SCR• Close a TDR• Undo the closure of a TDR• Delete a TDR• Generate SCR testing reports<ul style="list-style-type: none">• SCR Testing Hardcopy Report• TDR Statistics Report, SCR Level• TDR Statistics Report, SCR Event• TDR Statistics Report, SCR Full Detail	

Technical/Functional Employee User Type		6 of 6
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> System Testing (Chapter 17) 	<ul style="list-style-type: none"> View system tests Maintain testing levels <ul style="list-style-type: none"> Add a testing level Start a testing level Complete a testing level Delete a testing level Maintain testing events <ul style="list-style-type: none"> Add a testing event Start a testing event Complete a testing event Delete a testing event Maintain TDR <ul style="list-style-type: none"> Add a TDR Route a TDR Identify the SCR for the TDR Identify the CI's on the SCR for the TDR Generate CCO's on the SCR Close a TDR Undo the closure of a TDR Delete a TDR Generate system testing reports <ul style="list-style-type: none"> System Testing Hardcopy Report TDR Statistics Report, System Level TDR Statistics Report, System Event TDR Statistics Report, System Full Detail System Testing Transferred TDR's Report 	
<ul style="list-style-type: none"> Resource Maintenance (Chapter 5) 	<ul style="list-style-type: none"> View acting assignments Maintain unavailability information for self 	

Technical/Functional Action Manager User Types		1 of 6
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> Program Trouble Report (Chapter 7) 	<ul style="list-style-type: none"> Record a problem (PTR) detected in the production version of the system Refer the problem for analysis and resolution Record resolution for problem Generate an SCR from the problem Specify an existing SCR that resolves the problem 	

<ul style="list-style-type: none"> • System Change Request • System Change Request Part Two (Chapter 10) 	<ul style="list-style-type: none"> • Submit a change for an AIS (create a new SCR) • Electronically route/forward SCR • Perform duties assigned by Change Coordinator and or/ Action Manager <ul style="list-style-type: none"> • Requirements rewrite • Functional analysis • Technical analysis • Requirements review • Initial impacting • Final impacting • Specify tasks (CCO's) necessary to accomplish the SCR • Delete an SCR • Create an SCR amendment • Specify an existing PTR (problem) that the SCR will resolve • Create/Modify/Delete an SCR attachment • Create/Modify/Delete an SCR note • Generate an SCR report <ul style="list-style-type: none"> • SCR Hardcopy Report • SCR Approvals Report • SCR Workload Report • SCR Listing Report • SCR Master Report • SCR Text Report • Rejected SCR Approvals Report
--	--

Technical/Functional Action Manager User Types		2 of 6
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> Release 	<ul style="list-style-type: none"> Specify dependencies between tasks (CCO's) to be performed within the release Break dependencies between tasks (CCO's) to be performed within the release Create milestones within the release Manually change revised scheduled dates Generate External Interface Reports <ul style="list-style-type: none"> Release Dependency Report Early/Late Starts Report Early/Late Delivery Report Report specifying Tasks Not Scheduled Report specifying Tasks Not Scheduled by Resource, Task Report specifying Tasks Not Scheduled by Resource Code and Resource Report specifying Tasks Scheduled to Start within a user-specified number of days Report specifying Tasks Scheduled to Start within a user-specified number of days by Resource Code and Resource Report specifying Tasks Scheduled to Start within a user-specified number of days Resource and Task Report specifying Tasks Scheduled to End within a user-specified number of days Report specifying Tasks Scheduled to End within a user-specified number of days by Resource Code and Resource Report specifying Tasks Scheduled to End within a user-specified number of days by Resource and Task Generate a Report specifying Resource Utilization 	
<ul style="list-style-type: none"> CI Start/Deliver (Chapter 13) 	<ul style="list-style-type: none"> Specify the beginning of development work for a CI Specify the completion of development work for a CI Specify the beginning of test and evaluation work for a CI Generate CCO Report by CI Report Generate CCO Report by Release Report 	

Technical/Functional Action Manager User Types 3 of 6	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • Routing Inquiry – SCR Routings (Chapter 12) • Release (Chapter 11) 	<ul style="list-style-type: none"> • Specify SCR approvals filtering criteria • View all SCR approvals within the filter criteria specified • View open SCR approvals within the filter criteria specified • Open System Change Request Part Two window from SCR Approval Inquiry • Generate SCR Approval reports <ul style="list-style-type: none"> • SCR Approval Inquiry Report • SCR Rejected Approvals Report
<ul style="list-style-type: none"> • CI Testing TDR Routing Inquiry (Chapter 12) 	<ul style="list-style-type: none"> • Specify CI testing TDR routings filtering criteria • View all CI testing TDR routings within the filter criteria specified • View open CI testing TDR routings within the filter criteria specified • Open SCR Part Two window from the CI Testing TDR Routing Inquiry window • View the TDR of the CI Testing TDR Routing • Generate CI Testing TDR Routings Report
<ul style="list-style-type: none"> • SCR Testing TDR Routings (Chapter 12) 	<ul style="list-style-type: none"> • Specify SCR testing TDR routing filtering criteria • View all SCR testing TDR routings within the filter criteria specified • View open SCR testing TDR routings within the filter criteria specified • Open SCR Part Two window from the SCR Testing TDR Routing Inquiry window • View the TDR of the SCR testing TDR routing • Generate SCR Testing TDR Routings Report
Technical/Functional Action Manager User Types 4 of 6	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • System Testing TDR Routings (Chapter 12) 	<ul style="list-style-type: none"> • Specify system testing TDR routings filtering criteria • View all system testing TDR routings within the filter criteria specified • View open system testing TDR routings within the filter criteria specified • Open System Change Request Part Two window from the System Testing TDR Routing Inquiry window • View the TDR of the System Testing TDR Routing • Generate System Testing TDR Routings Report

<ul style="list-style-type: none"> • CI Testing (Chapter 15) 	<ul style="list-style-type: none"> • View CI deliveries <ul style="list-style-type: none"> • Deliveries unprocessed by release management • Deliveries with open quality assurance (QA) tasks • All deliveries • View CI testing details • Maintain testing levels <ul style="list-style-type: none"> • Add a testing level • Start a testing level • Complete a testing level • Delete a testing level • Maintain testing deficiency report (TDR) <ul style="list-style-type: none"> • Create a new TDR • Route a TDR • Identify the SCR for the TDR • Identify CI's on the SCR for the TDR • Generate CCO's on the SCR • Delete a TDR • View the QA CCO's for the CI test • View the SCR's for the CI test • Generate CI testing reports <ul style="list-style-type: none"> • Configuration Item Test Hardcopy Report • QA Status Report (Latest Delivery) • QA Status Report (All Deliveries) • QA Status Report By Release (Latest Delivery) • QA Status Report By Release (All Deliveries)
Technical/Functional Action Manager User Types	
5 of 6	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • System Change Request Testing (Chapter 16) 	<ul style="list-style-type: none"> • View SCR tests • Maintain testing events <ul style="list-style-type: none"> • Add a testing event • Start a testing event • Complete a testing event • Delete a testing event • Maintain testing deficiency report (TDR) <ul style="list-style-type: none"> • Add a testing TDR • Route a TDR • Identify the CI's on the SCR for the TDR • Generate CCO's on the SCR • Close a TDR • Undo the closure of a TDR • Delete a TDR • Generate SCR testing reports <ul style="list-style-type: none"> • SCR Testing Hardcopy Report • TDR Statistics Report, SCR Level • TDR Statistics Report, SCR Event • TDR Statistics Report, SCR Full Detail

Technical/Functional Action Manager User Types		6 of 6
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> • System Testing (Chapter 17) 	<ul style="list-style-type: none"> • View system tests • Maintain testing levels <ul style="list-style-type: none"> • Add a testing level • Start a testing level • Complete a testing level • Delete a testing level • Maintain testing events <ul style="list-style-type: none"> • Add a testing event • Start a testing event • Complete a testing event • Delete a testing event • Maintain TDR <ul style="list-style-type: none"> • Add a TDR • Route a TDR • Identify the SCR for the TDR • Identify the CI's on the SCR for the TDR • Generate CCO's on the SCR • Close a TDR • Undo the closure of a TDR • Delete a TDR • Generate system testing reports <ul style="list-style-type: none"> • System Testing Hardcopy Report • TDR Statistics Report, System Level • TDR Statistics Report, System Event • TDR Statistics Report, System Full Detail • System Testing Transferred TDR's Report 	
<ul style="list-style-type: none"> • Resource Maintenance (Chapter 5) 	<ul style="list-style-type: none"> • Create acting assignments for a user • Delete an acting assignment for a user • View a user's acting assignment(s) <ul style="list-style-type: none"> • Maintain unavailability for a user 	

Technical Change Coordinator User Type		1 of 5
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none">• AIS Maintenance (Chapter 4)	<ul style="list-style-type: none">• Change AIS-specific configuration parameters<ul style="list-style-type: none">• Maximum SCR Amendments Number• Maximum Change Size• Require Estimated Staff Hours for CCO's• Require Actual Hours Per CI• Allow Amendments on Unlocked SCR's• Allow Remote Users to View Canceled/Closed SCR's• Return Messages Upon AM Rejection of an SCR Routing• Change AIS-specific accounting parameters to specify default values for SCR accounting elements<ul style="list-style-type: none">• Maintain list of rejection reasons for SCR routings• Requiring a reason when an SCR routing is rejected• Maintain list of SCR Note Categories• Maintaining list of TDR Origins	
<ul style="list-style-type: none">• Program Trouble Report (Chapter 7)	<ul style="list-style-type: none">• Generate an SCR from the PTR• Specify an existing SCR that resolves the PTR• Copy the PTR to another AIS for resolution	

Technical Change Coordinator User Type		2 of 5
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> • System Change Request • System Change Request Part Two (Chapter 10) 	<ul style="list-style-type: none"> • Electronically route SCR to perform required analysis and impacting <ul style="list-style-type: none"> • Requirements rewrite • Functional analysis • Technical analysis • Requirements review • Initial impacting • Final impacting • Higher Authority • Transfer control • Manually change the SCR's status • Cancel an SCR • Reactivate an SCR • Create an amendment to an SCR • Lock an SCR • Specify an existing PTR that the SCR will resolve • Create a dependent change in another AIS • Create a dependent relationship to an SCR in another AIS • Break a dependent relationship with an SCR in another AIS • Create/Modify/Delete an SCR attachment • Create/Modify/Delete an SCR note • Generate SCR reports <ul style="list-style-type: none"> • SCR Hardcopy Report • SCR Approvals Report • SCR Workload Report • SCR Listing Report • SCR Master Report • SCR Text Report • Rejected SCR Approvals Report 	

Technical Change Coordinator User Type		3 of 5
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none">• Release (Chapter 11)	<ul style="list-style-type: none">• Create a new release• Select SCR's for a release• Remove SCR's from a release• Rank SCR's in a release• Lock the release• Change the release identifier• Generate release reports<ul style="list-style-type: none">• Release Letter Enclosure Report• Release Certification Report• SCR Selection Report• All Releases Report• Open Releases Report• SCR Selection Report• All System Change Requests for a Release Report• Open System Change Requests for a Release Report• QA Status Report – Latest Delivery• QA Status Report – All Deliveries• QA Status Report by Release – Latest Delivery• QA Status Report by Release – All Deliveries	

Technical Change Coordinator User Type		4 of 5
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> • Release (Chapter 11) 	<ul style="list-style-type: none"> • Create milestones within the release • Export release to Microsoft Project • Import release from Microsoft Project • Generate Reports <ul style="list-style-type: none"> • Release Import PM Tool Error Report • Release Dependency Report • Early/Late Starts Report • Early/Late Delivery Report • Tasks Not Scheduled Report • Tasks Not Scheduled Report by Resource, Task • Tasks Not Scheduled Report by Resource Code, Resource • Tasks Scheduled to Start within a user-specified number of days Report • Tasks Scheduled to Start within a user-specified number of days Report by Resource Code, Resource • Tasks Scheduled to Start within a user-specified number of days Report by Resource, Task • Tasks Scheduled to End within a user-specified number of days Report • Tasks Scheduled to End within a user-specified number of days Report by Resource Code, Resource • Tasks Scheduled to End within a user-specified number of days Report by Resource, Task • Resource Utilization Report 	
<ul style="list-style-type: none"> • Routing Inquiry – SCR Routings (Chapter 12) • Release (Chapter 11) 	<ul style="list-style-type: none"> • Specify SCR approvals filtering criteria • View all SCR approvals within the filter criteria specified • View open SCR approvals within the filter criteria specified • Open System Change Request Part Two window from SCR Approval Inquiry • Generate SCR approval reports <ul style="list-style-type: none"> • SCR Approval Inquiry Report • SCR Rejected Approvals Report 	

Technical Change Coordinator User Type		5 of 5
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> CI Testing TDR Routing Inquiry (Chapter 12) 	<ul style="list-style-type: none"> Specify CI testing TDR routings filtering criteria View all CI testing TDR routings within the filter criteria specified View open CI testing TDR routings within the filter criteria specified Open SCR Part Two window from the CI Testing TDR Routing Inquiry window View the TDR of the CI testing TDR routing Generate CI Testing TDR Routings Report 	
<ul style="list-style-type: none"> SCR Testing TDR Routings (Chapter 12) 	<ul style="list-style-type: none"> Specify SCR testing TDR routing filtering criteria View all SCR testing TDR routings within the filter criteria specified View open SCR testing TDR routings within the filter criteria specified Open SCR Part Two window from the SCR Testing TDR Routing Inquiry window View the TDR of the SCR testing TDR routing Generate SCR Testing TDR Routings Report 	
<ul style="list-style-type: none"> System Testing TDR Routings (Chapter 12) 	<ul style="list-style-type: none"> Specify system testing TDR routings filtering criteria View all system testing TDR routings within the filter criteria specified View open system testing TDR routings within the filter criteria specified Open System Change Request Part Two window from the System Testing TDR Routing Inquiry window View the TDR of the system testing TDR routing Generate System Testing TDR Routings Report 	
<ul style="list-style-type: none"> Resource Maintenance (Chapter 5) 	<ul style="list-style-type: none"> Maintain user's serial routing sequence Create acting assignments for a user Delete acting assignments for the user View acting assignments for a user 	

Functional Change Coordinator User Type		1 of 3
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> Program Trouble Report (Chapter 7) 	<ul style="list-style-type: none"> Generate an SCR from a PTR Specify an existing SCR that resolves the PTR Copy the PTR to another AIS for resolution 	

<ul style="list-style-type: none"> • System Change Request • System Change Request Part Two (Chapter 10) 	<ul style="list-style-type: none"> • Electronically route SCR to perform required analysis and impacting <ul style="list-style-type: none"> • Requirements rewrite • Functional analysis • Technical analysis • Requirements review • Initial impacting • Final impacting • Higher Authority • Transfer control • Manually change the SCR's status • Cancel an SCR • Reactivate an SCR • Create an amendment to an SCR • Specify an existing PTR that the SCR will resolve • Create a dependent change in another AIS • Create a dependent relationship to an SCR in another AIS • Break a dependent relationship with an SCR in another AIS • Create/Modify/Delete an SCR attachment • Create/Modify/Delete an SCR note • Generate SCR reports <ul style="list-style-type: none"> • SCR Hardcopy Report • SCR Approvals Report • SCR Workload Report • SCR Listing Report • SCR Master Report • SCR Text Report • Rejected SCR Approvals Report
<p align="center">Functional Change Coordinator User Type 2 of 3</p>	
<p>CMIS Window</p>	<p>Most Common Tasks</p>
<ul style="list-style-type: none"> • Routing Inquiry – SCR Routings (Chapter 12) • Release (Chapter 11) 	<ul style="list-style-type: none"> • Specify SCR approvals filtering criteria • View all SCR approvals within the filter criteria specified • View open SCR approvals within the filter criteria specified • Open System Change Request Part Two window from SCR Approval Inquiry • Generate SCR approval reports <ul style="list-style-type: none"> • SCR Approval Inquiry Report • SCR Rejected Approvals Report

<ul style="list-style-type: none"> • CI Testing TDR Routing Inquiry (Chapter 12) 	<ul style="list-style-type: none"> • Specify CI testing TDR routings filtering criteria • View all CI testing TDR routings within the filter criteria specified • View open CI testing TDR routings within the filter criteria specified • Open SCR Part Two window from the CI Testing TDR Routing Inquiry window • View the TDR of the CI testing TDR routing • Generate CI Testing TDR Routings Report
<ul style="list-style-type: none"> • SCR Testing TDR Routings (Chapter 12) 	<ul style="list-style-type: none"> • Specify SCR testing TDR routing filtering criteria • View all SCR testing TDR routings within the filter criteria specified • View open SCR testing TDR routings within the filter criteria specified • Open SCR Part Two window from the SCR Testing TDR Routing Inquiry window • View the TDR of the SCR testing TDR routing • Generate SCR Testing TDR Routings Report
Functional Change Coordinator User Type 3 of 3	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • System Testing TDR Routings (Chapter 12) 	<ul style="list-style-type: none"> • Specify system testing TDR routings filtering criteria • View all system testing TDR routings within the filter criteria specified • View open system testing TDR routings within the filter criteria specified • Open System Change Request Part Two window from the System Testing TDR Routing Inquiry window • View the TDR of the system testing TDR routing • Generate System Testing TDR Routings Report
<ul style="list-style-type: none"> • Resource Maintenance (Chapter 5) 	<ul style="list-style-type: none"> • Maintain user's serial routing sequence • Create acting assignments for a user • Delete acting assignments for the user • View acting assignments for a user

Technical Action Manager/Change Coordinator User Type 1 of 9	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> AIS Maintenance (Chapter 4) 	<ul style="list-style-type: none"> Change AIS-specific configuration parameters <ul style="list-style-type: none"> Maximum SCR Amendments Number Maximum Change Size Require Estimated Staff Hours for CCO's Require Actual Hours Per CI Allow Amendments on Unlocked SCR's Allow Remote Users to View Canceled/Closed SCR's Return Messages Upon AM Rejection of an SCR Routing Change AIS-specific accounting parameters to specify default values for SCR accounting elements Maintain list of rejection reasons for SCR routings Requiring a reason when an SCR routing is rejected Maintain list of SCR Note Categories Maintaining list of TDR Origins
<ul style="list-style-type: none"> Program Trouble Report (Chapter 7) 	<ul style="list-style-type: none"> Record a problem (PTR) detected in the production version of an automated information system (AIS) Refer the PTR for analysis and resolution Record a resolution for the PTR Generate an SCR from the PTR Specify an existing SCR that resolves the problem identified in a PTR Copy the PTR to another AIS for resolution

Technical Action Manager/Change Coordinator User Type 2 of 9	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • System Change Request • System Change Request Part Two (Chapter 10) 	<ul style="list-style-type: none"> • Electronically route SCR to perform required analysis and impacting <ul style="list-style-type: none"> • Requirements rewrite • Functional analysis • Technical analysis • Requirements review • Initial impacting • Final impacting • Higher Authority • Transfer control • Specify tasks (CCO's) to accomplish the change • Manually change the SCR's status • Cancel an SCR • Reactivate an SCR • Delete an SCR • Create an amendment to an SCR • Lock an SCR • Specify an existing PTR that the SCR will resolve • Create a dependent change in another AIS • Create a dependent relationship to an SCR in another AIS • Break a dependent relationship with an SCR in another AIS • Create/Modify/Delete an SCR attachment • Create/Modify/Delete an SCR note • Generate SCR reports <ul style="list-style-type: none"> • SCR Hardcopy Report • SCR Approvals Report • SCR Workload Report • SCR Listing Report • SCR Master Report • SCR Text Report • Rejected SCR Approvals Report

Technical Action Manager/Change Coordinator User Type 3 of 9	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • Release (Chapter 11) 	<ul style="list-style-type: none"> • Create a new release • Select SCR's for a release • Remove SCR's from a release • Rank SCR's in a release • Lock the release • Change the release identifier • Generate release reports <ul style="list-style-type: none"> • Release Letter Enclosure Report • Release Certification Report • SCR Selection Report • All Releases Report • Open Releases Report • SCR Selection Report • All System Change Requests for a Release Report • Open System Change Requests for a Release Report • QA Status Report – Latest Delivery • QA Status Report – All Deliveries • QA Status Report by Release – Latest Delivery • QA Status Report by Release – All Deliveries

Technical Action Manager/Change Coordinator User Type 4 of 9	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • Release (Chapter 11) 	<ul style="list-style-type: none"> • Create milestones within the release • Export release to Microsoft Project • Import release from Microsoft Project • Generate Reports <ul style="list-style-type: none"> • Release Import PM Tool Error Report • Release Dependency Report • Early/Late Starts Report • Early/Late Delivery Report • Tasks Not Scheduled Report • Tasks Not Scheduled Report by Resource, Task • Tasks Not Scheduled Report by Resource Code, Resource • Tasks Scheduled to Start within a user-specified number of days Report • Tasks Scheduled to Start within a user-specified number of days Report by Resource Code, Resource • Tasks Scheduled to Start within a user-specified number of days Report by Resource, Task • Tasks Scheduled to End within a user-specified number of days Report • Tasks Scheduled to End within a user-specified number of days Report by Resource Code, Resource • Tasks Scheduled to End within a user-specified number of days Report by Resource, Task • Resource Utilization Report
<ul style="list-style-type: none"> • Configuration Item Start/Deliver (Chapter 13) 	<ul style="list-style-type: none"> • Specify the beginning of development work for a CI • Specify the completion of development work for a CI • Specify the beginning of test and evaluation work for a CI • Generate Configuration Change Order Report by Configuration Item • Generate Configuration Change Order Report by Release

Technical Action Manager/Change Coordinator User Type 5 of 9	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • Routing Inquiry – SCR Routings (Chapter 12) • Release (Chapter 11) 	<ul style="list-style-type: none"> • Specify SCR approvals filtering criteria • View all SCR approvals within the filter criteria specified • View open SCR approvals within the filter criteria specified • Open System Change Request Part Two window from SCR Approval Inquiry • Generate SCR approval reports <ul style="list-style-type: none"> • SCR Approval Inquiry Report • SCR Rejected Approvals Report
<ul style="list-style-type: none"> • CI Testing TDR Routing Inquiry (Chapter 12) 	<ul style="list-style-type: none"> • Specify CI testing TDR routings filtering criteria • View all CI testing TDR routings within the filter criteria specified • View open CI testing TDR routings within the filter criteria specified • Open SCR Part Two window from the CI Testing TDR Routing Inquiry window • View the TDR of the CI testing TDR routing • Generate CI Testing TDR Routings Report
<ul style="list-style-type: none"> • SCR Testing TDR Routings (Chapter 12) 	<ul style="list-style-type: none"> • Specify SCR testing TDR routing filtering criteria • View all SCR testing TDR routings within the filter criteria specified • View open SCR testing TDR routings within the filter criteria specified • Open SCR Part Two window from the SCR Testing TDR Routing Inquiry window • View the TDR of the SCR testing TDR routing • Generate SCR Testing TDR Routings Report
Technical Action Manager/Change Coordinator User Type 6 of 9	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • System Testing TDR Routings (Chapter 12) 	<ul style="list-style-type: none"> • Specify system testing TDR routings filtering criteria • View all system testing TDR routings within the filter criteria specified • View open system testing TDR routings within the filter criteria specified • Open System Change Request Part Two window from the System Testing TDR Routing Inquiry window • View the TDR of the system testing TDR routing • Generate System Testing TDR Routings Report

Technical Action Manager/Change Coordinator User Type 7 of 9	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • CI Testing (Chapter 15) 	<ul style="list-style-type: none"> • View CI deliveries <ul style="list-style-type: none"> • Deliveries unprocessed by release management • Deliveries with open quality assurance (QA) tasks • All deliveries • View CI testing details • Maintain testing levels <ul style="list-style-type: none"> • Add a testing level • Start a testing level • Complete a testing level • Delete a testing level • Maintain testing deficiency report (TDR) <ul style="list-style-type: none"> • Create a new TDR • Route a TDR • Identify the SCR for the TDR • Identify the CI's on the SCR for the TDR • Generate CCO's on the SCR • Delete a TDR • View the QA CCO's for the CI test • View the SCR's for the CI test • Generate CI testing reports <ul style="list-style-type: none"> • Configuration Item Test Hardcopy Report • QA Status Report (Latest Delivery) • QA Status Report (All Deliveries) • QA Status Report By Release (Latest Delivery) • QA Status Report By Release (All Deliveries)

Technical Action Manager/Change Coordinator User Type 8 of 9	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • System Change Request Testing (Chapter 16) 	<ul style="list-style-type: none"> • View SCR tests • Maintain testing events <ul style="list-style-type: none"> • Add a testing event • Start a testing event • Complete a testing event • Delete a testing event • Maintain testing deficiency report (TDR) <ul style="list-style-type: none"> • Add a testing TDR • Route a TDR • Identify the CI's on the SCR for the TDR • Generate CCO's on the SCR • Close a TDR • Undo the closure of a TDR • Delete a TDR • Generate SCR testing reports <ul style="list-style-type: none"> • SCR Testing Hardcopy Report • TDR Statistics Report, SCR Level • TDR Statistics Report, SCR Event • TDR Statistics Report, SCR Full Detail

Technical Action Manager/Change Coordinator User Type 9 of 9	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • System Testing (Chapter 17) 	<ul style="list-style-type: none"> • View system tests • Maintain testing levels <ul style="list-style-type: none"> • Add a testing level • Start a testing level • Complete a testing level • Delete a testing level • Maintain testing events <ul style="list-style-type: none"> • Add a testing event • Start a testing event • Complete a testing event • Delete a testing event • Maintain TDR <ul style="list-style-type: none"> • Add a TDR • Route a TDR • Identify the SCR for the TDR • Identify the CI's on the SCR for the TDR • Generate CCO's on the SCR • Close a TDR • Undo the closure of a TDR • Delete a TDR • Generate system testing reports <ul style="list-style-type: none"> • System Testing Hardcopy Report • TDR Statistics Report, System Level • TDR Statistics Report, System Event • TDR Statistics Report, System Full Detail • System Testing Transferred TDR's Report
<ul style="list-style-type: none"> • Resource Maintenance (Chapter 5) 	<ul style="list-style-type: none"> • Maintain user's serial routing sequence • Create acting assignments for a user • Delete acting assignments for a user • View acting assignments of a user

Functional Action Manager/Change Coordinator User Type 1 of 6	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • Program Trouble Report (Chapter 7) 	<ul style="list-style-type: none"> • Record a problem (PTR) detected in the production version of an automated information system (AIS) • Refer the PTR for analysis and resolution • Record a resolution for the PTR • Generate an SCR from the PTR • Specify an existing SCR that resolves the problem identified in a PTR • Copy the PTR to another AIS for resolution

<ul style="list-style-type: none"> • System Change Request • System Change Request Part Two (Chapter 10) 	<ul style="list-style-type: none"> • Electronically route SCR to perform required analysis and impacting <ul style="list-style-type: none"> • Requirements rewrite • Functional analysis • Technical analysis • Requirements review • Initial impacting • Final impacting • Higher Authority • Transfer control • Specify tasks (CCO's) to accomplish the change • Manually change the SCR's status • Cancel an SCR • Reactivate an SCR • Delete an SCR • Create an amendment to an SCR • Specify an existing PTR that the SCR will resolve • Create a dependent change in another AIS • Create a dependent relationship to an SCR in another AIS • Break a dependent relationship with an SCR in another AIS • Create/Modify/Delete an SCR attachment • Create/Modify/Delete an SCR note • Generate SCR reports <ul style="list-style-type: none"> • SCR Hardcopy Report • SCR Approvals Report • SCR Workload Report • SCR Listing Report • SCR Master Report • SCR Text Report • Rejected SCR Approvals Report
Functional Action Manager/Change Coordinator User Type 2 of 6	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • Configuration Item Start/Deliver (Chapter 13) 	<ul style="list-style-type: none"> • Specify the beginning of development work for a CI • Specify the completion of development work for a CI • Specify the beginning of test and evaluation work for a CI • Generate Configuration Change Order Report by Configuration Item • Generate Configuration Change Order Report by Release

<ul style="list-style-type: none"> • Routing Inquiry – SCR Routings (Chapter 12) • Release (Chapter 11) 	<ul style="list-style-type: none"> • Specify SCR approvals filtering criteria • View all SCR approvals within the filter criteria specified • View open SCR approvals within the filter criteria specified • Open System Change Request Part Two window from SCR Approval Inquiry • Generate SCR approval reports <ul style="list-style-type: none"> • SCR Approval Inquiry Report • SCR Rejected Approvals Report
<ul style="list-style-type: none"> • CI Testing TDR Routing Inquiry (Chapter 12) 	<ul style="list-style-type: none"> • Specify CI testing TDR routings filtering criteria • View all CI testing TDR routings within the filter criteria specified • View open CI testing TDR routings within the filter criteria specified • Open SCR Part Two window from the CI Testing TDR Routing Inquiry window • View the TDR of the CI testing TDR routing • Generate CI Testing TDR Routings Report
<ul style="list-style-type: none"> • SCR Testing TDR Routings (Chapter 12) 	<ul style="list-style-type: none"> • Specify SCR testing TDR routing filtering criteria • View all SCR testing TDR routings within the filter criteria specified • View open SCR testing TDR routings within the filter criteria specified • Open SCR Part Two window from the SCR Testing TDR Routing Inquiry window • View the TDR of the SCR testing TDR routing • Generate SCR Testing TDR Routings Report
Functional Action Manager/Change Coordinator User Type 3 of 6	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • System Testing TDR Routings (Chapter 12) 	<ul style="list-style-type: none"> • Specify system testing TDR routings filtering criteria • View all system testing TDR routings within the filter criteria specified • View open system testing TDR routings within the filter criteria specified • Open System Change Request Part Two window from the System Testing TDR Routing Inquiry window • View the TDR of the system testing TDR routing • Generate System Testing TDR Routings Report

Functional Action Manager/Change Coordinator User Type 4 of 6	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • CI Testing (Chapter 15) 	<ul style="list-style-type: none"> • View CI deliveries <ul style="list-style-type: none"> • Deliveries unprocessed by release management • Deliveries with open quality assurance (QA) tasks • All deliveries • View CI testing details • Maintain testing levels <ul style="list-style-type: none"> • Add a testing level • Start a testing level • Complete a testing level • Delete a testing level • Maintain testing deficiency report (TDR) <ul style="list-style-type: none"> • Create a new TDR • Route a TDR • Identify the SCR for the TDR • Identify the CI's on the SCR for the TDR • Generate CCO's on the SCR • Delete a TDR • View the QA CCO's for the CI test • View the SCR's for the CI test • Generate CI testing reports <ul style="list-style-type: none"> • Configuration Item Test Hardcopy Report • QA Status Report (Latest Delivery) • QA Status Report (All Deliveries) • QA Status Report By Release (Latest Delivery) • QA Status Report By Release (All Deliveries)

Functional Action Manager/Change Coordinator User Type 5 of 6	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none">• System Change Request Testing (Chapter 16)	<ul style="list-style-type: none">• View SCR tests• Maintain testing events<ul style="list-style-type: none">• Add a testing event• Start a testing event• Complete a testing event• Delete a testing event• Maintain testing deficiency report (TDR)<ul style="list-style-type: none">• Add a testing TDR• Route a TDR• Identify the CI's on the SCR for the TDR• Generate CCO's on the SCR• Close a TDR• Undo the closure of a TDR• Delete a TDR• Generate SCR testing reports<ul style="list-style-type: none">• SCR Testing Hardcopy Report• TDR Statistics Report, SCR Level• TDR Statistics Report, SCR Event• TDR Statistics Report, SCR Full Detail

Functional Action Manager/Change Coordinator User Type 6 of 6	
CMIS Window	Most Common Tasks
<ul style="list-style-type: none"> • System Testing (Chapter 17) 	<ul style="list-style-type: none"> • View system tests • Maintain testing levels <ul style="list-style-type: none"> • Add a testing level • Start a testing level • Complete a testing level • Delete a testing level • Maintain testing events <ul style="list-style-type: none"> • Add a testing event • Start a testing event • Complete a testing event • Delete a testing event • Maintain TDR <ul style="list-style-type: none"> • Add a TDR • Route a TDR • Identify the SCR for the TDR • Identify the CI's on the SCR for the TDR • Generate CCO's on the SCR • Close a TDR • Undo the closure of a TDR • Delete a TDR • Generate system testing reports <ul style="list-style-type: none"> • System Testing Hardcopy Report • TDR Statistics Report, System Level • TDR Statistics Report, System Event • TDR Statistics Report, System Full Detail • System Testing Transferred TDR's Report
<ul style="list-style-type: none"> • Resource Maintenance (Chapter 5) 	<ul style="list-style-type: none"> • Maintain user's serial routing sequence • Create acting assignments for a user • Delete acting assignments for a user • View acting assignments of a user • Maintain unavailability for a user

Technical Configuration Manager User Type		1 of 2
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> AIS Maintenance (Chapter 4) 	<ul style="list-style-type: none"> Change AIS-specific configuration parameters <ul style="list-style-type: none"> Maximum SCR Amendments Number Maximum Change Size Require Estimated Staff Hours for CCO's Require Actual Hours Per CI Allow Amendments on Unlocked SCR's Allow Remote Users to View Canceled/Closed SCR's Return Messages Upon AM Rejection of an SCR Routing Change AIS-specific accounting parameters to specify default values for SCR accounting elements <ul style="list-style-type: none"> Maintain list of rejection reasons for SCR routings Requiring a reason when an SCR routing is rejected Maintain list of SCR Note Categories Maintaining list of TDR Origins 	
<ul style="list-style-type: none"> System Change Request System Change Request Part Two (Chapter 10) 	<ul style="list-style-type: none"> Manually change the SCR's status Cancel an SCR Reactivate an SCR Lock an SCR Unlock an SCR 	
<ul style="list-style-type: none"> Release (Chapter 11) 	<ul style="list-style-type: none"> Unlock a release Generate a Release Letter Enclosure Report Generate a Release Certification Report Certify a release 	
<ul style="list-style-type: none"> Configuration Item Types (Chapter 8) 	<ul style="list-style-type: none"> Create a new CI type Change an existing CI type Delete an existing CI type View all existing tasks (CCO's) that reference a CI type View open existing tasks (CCO's) that reference a CI type Generate Configuration Item Type Hardcopy Report 	

Technical Configuration Manager User Type		2 of 2
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> • Configuration Item (Chapter 8) 	<ul style="list-style-type: none"> • Create a new CI • Change an existing CI • Delete an existing CI • Specify the automatic generation of test and evaluation CCO's for the CI • View all existing tasks (CCO's) that reference a CI • View open existing tasks (CCO's) that reference a CI • Make mass change to CI's in system tables • Generate Configuration Items Report 	
<ul style="list-style-type: none"> • Release (Chapter 11) 	<ul style="list-style-type: none"> • Generate dBase 4 file types containing data from the Oracle database <ul style="list-style-type: none"> • Selectively choose data based on release certification • Select all data 	

Technical/Functional Remote User User Type		1 of 1
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> • System Change Request • System Change Request Part Two (Chapter 10) 	<ul style="list-style-type: none"> • Submit a change for an AIS (create a new SCR) • Electronically route/forward SCR • Perform duties assigned from Change Coordinator and/or Action Manager <ul style="list-style-type: none"> • Requirements rewrite • Create an amendment • Generate SCR reports <ul style="list-style-type: none"> • SCR Hardcopy Report • SCR Listing Report • SCR Text Report 	

Technical Higher Authority User Type		1 of 1
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> • AIS Maintenance (Chapter 4) 	<ul style="list-style-type: none"> • Change AIS-specific parameters <ul style="list-style-type: none"> • SCR Threshold • Staff Hour Amount 	

<ul style="list-style-type: none"> • System Change Request • System Change Request Part Two (Chapter 10) 	<ul style="list-style-type: none"> • Submit a change for an AIS (create a new SCR) • Electronically route/forward SCR • Perform duties assigned from Change Coordinator and/or Action Manager <ul style="list-style-type: none"> • Higher Authority • Create an SCR amendment • Create/Modify/Delete an SCR attachment • Create/Modify/Delete an SCR note • Generate an SCR report <ul style="list-style-type: none"> • SCR Hardcopy Report • SCR Approvals Report • SCR Workload Report • SCR Listing Report • SCR Master Report • SCR Text Report • Rejected SCR Approvals Report
--	--

Technical Supervisor User Type		1 of 2
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> • AIS Maintenance (Chapter 4) 	<ul style="list-style-type: none"> • Create a new AIS • Delete an existing AIS • View users assigned to AIS • View a user's AIS access and privileges • Add members to an AIS • Delete members from an AIS • Generate an AIS Maintenance Report 	
<ul style="list-style-type: none"> • Security Classifications (Chapter 5) 	<ul style="list-style-type: none"> • Create a new security class • Change security access settings • Delete an existing security class • Generate Security Classification Titles Report 	

Technical Supervisor User Type		2 of 2
CMIS Window	Most Common Tasks	
<ul style="list-style-type: none"> • Resource Maintenance (Chapter 4) 	<ul style="list-style-type: none"> • Add a new user to CMIS • Change user's configuration data • Change user's ID • Add an AIS access for a user • Delete AIS access for a user • View a user's AIS access and privileges • Maintain user's AM to employee relationships • Maintain User's AM to AM relationships • Reassign a resource's responsibilities • Generate User ID/Password Report • Generate User ID/Password Report for Unassigned Users (employees without AM's) • Generate an Organization Report 	
<ul style="list-style-type: none"> • Release (Chapter 11) 	<ul style="list-style-type: none"> • Baseline a release 	
<ul style="list-style-type: none"> • Configuration Item Types (Chapter 8) 	<ul style="list-style-type: none"> • Import CI types into CMIS 	
<ul style="list-style-type: none"> • Configuration Item (Chapter 9) 	<ul style="list-style-type: none"> • Import CI's into CMIS 	
<ul style="list-style-type: none"> • Release (Chapter 11) 	<ul style="list-style-type: none"> • Generate dBase 4 file types containing data from the Oracle database <ul style="list-style-type: none"> • Selectively choose data based on release certification • Select all data 	

Chapter 4 - AIS Maintenance Window



Overview

This chapter discusses adding, deleting, and modifying automated information systems (AIS's) as well as adding and deleting AIS members. You can find detailed information on modifying AIS members in Chapter 5, Resource Maintenance and Security Classifications Windows.

The AIS Maintenance window is divided into the following tabs:

Configuration Tab

Contains many parameters that allow users to tailor the behavior of CMIS to mirror the AIS's business environment.

Members Tab

Contains a list of the selected AIS's members and a list of resources available for assignment to the selected AIS.

Accounting Tab

Provides default funding information for newly created system change requests (SCR's).

SCR Rejection Tab

Allows authorized users to maintain a list of rejection reasons for SCR's and to require a rejection reason when a user rejects a routing.

SCR Note Cat. Tab

Allows authorized users to maintain a list of SCR Note Categories for the classification of notes attached to SCR's.

SCR Sub-System

Allows authorized users to maintain a list of SCR Sub-Systems which may be referenced on SCRs for this AIS.

TDR Origin Tab

Allows authorized users to maintain a list of test deficiency report (TDR) origins for use when a user creates or resolves a TDR.

TDR Priority

Allows authorized users to maintain a list of System Testing test deficiency report (TDR) priorities for use when a user creates a TDR.

TDR Criticality

Allows authorized users to maintain a list of System Testing test deficiency report (TDR) criticalities for use when a user creates a TDR.

When you create a new AIS, you usually will also add configuration and SCR accounting data for the AIS and assign members to the AIS at the same time. This chapter includes the steps for entering configuration and SCR accounting data for a new AIS and assigning AIS members as part of the process of creating a new AIS.

Deleting an AIS is a simple process of identifying the AIS to delete, then deleting it. When you delete an AIS in CMIS, it is only "logically" deleted. The AIS name remains in the CMIS database; however, it is not visible and therefore, not selectable.

This chapter also discusses creating and deleting rejection reasons for SCR's, origins for test deficiency reports (TDR's), and categories for SCR notes.

Restrictions

- Only the CMIS Administrator can create new AIS's and delete existing AIS's.
- Only CMIS users who are members of an AIS can access data in that AIS.
- Access to other options on the AIS Maintenance window depends on user type and security classification.

AIS Maintenance Window Options

Create a New AIS, Add an AIS Member, and Enter AIS Accounting Data

Delete an AIS Member

Create a New SCR Rejection Reason

Delete an SCR Rejection Reason

Create a New SCR Note Category

Modify an SCR Note Category

Delete an SCR Note Category

Create a New SCR Sub-System

Modify a SCR Sub-System

Delete a SCR Sub-System

Create a New TDR Origin

Modify a TDR Origin

Delete a TDR Origin

Create a New TDR Priority

Modify a TDR Priority

Delete a TDR Priority

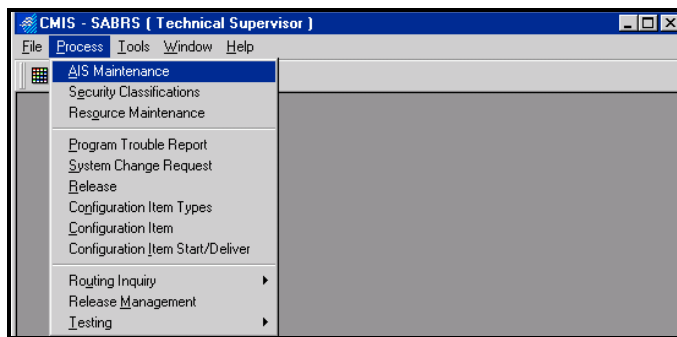
Create a New TDR Criticality

Modify a TDR Criticality

Delete a TDR Criticality

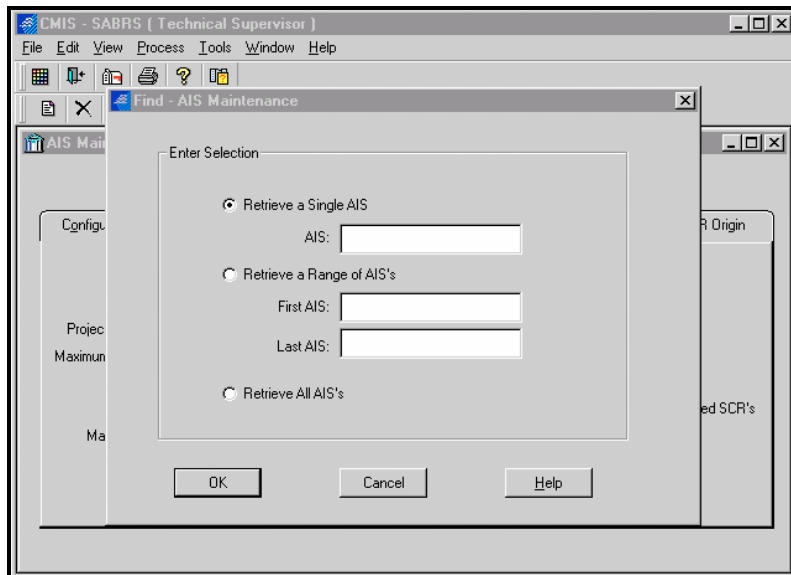
Delete an AIS

Open the AIS Maintenance window by selecting **AIS Maintenance** from the **Process** menu.



**F
i**

Initially, the Find window will open.



You can retrieve a single AIS, a range of AIS's or all AIS's within CMIS. Generally, the amount of data you retrieve determines the speed of the retrieval. Selecting a single AIS is quicker than selecting all available AIS's; however, unless there are more than 25 AIS's, the actual time to retrieve all AIS's versus only one is negligible. It is best simply to retrieve all AIS's.

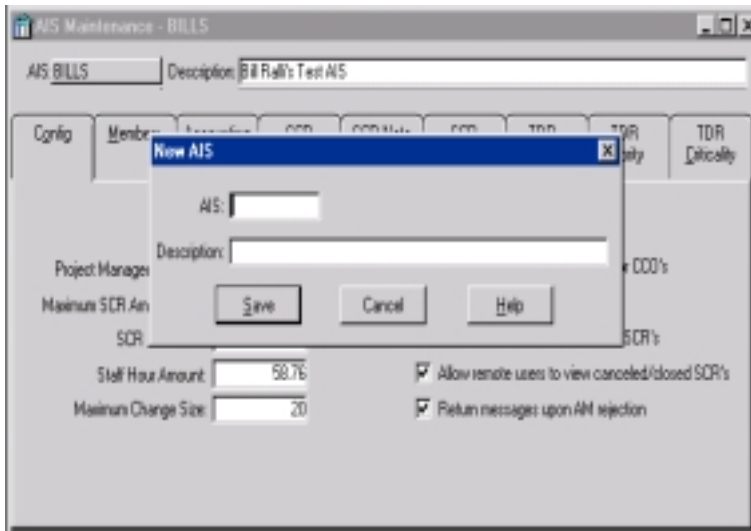
To retrieve all AIS's, select the **OK** button when the Find window opens (without specifying any values in the **AIS**, **First AIS**, or **Last AIS** fields). You can also select the **Retrieve All AIS's** radio button, then select the **OK** button.

■ Steps for Creating a New AIS, Adding an AIS Member, and Entering AIS Accounting Data

If you attempt to create a new AIS with the same name as an AIS already in the system, a message will advise you the AIS already exists and no further action is required. If you attempt to create an AIS with the same name as a previously deleted AIS, CMIS will ask if you wish to undelete the AIS. If you select **Yes**, the AIS will be restored. If you select **No**, the undelete action will abort and the New AIS window will close. When you undelete an AIS, you must re-establish the attributes of the AIS.

1. From the AIS Maintenance window, select the **File** menu **New** item or the toolbar **New** button.

The New AIS window opens.

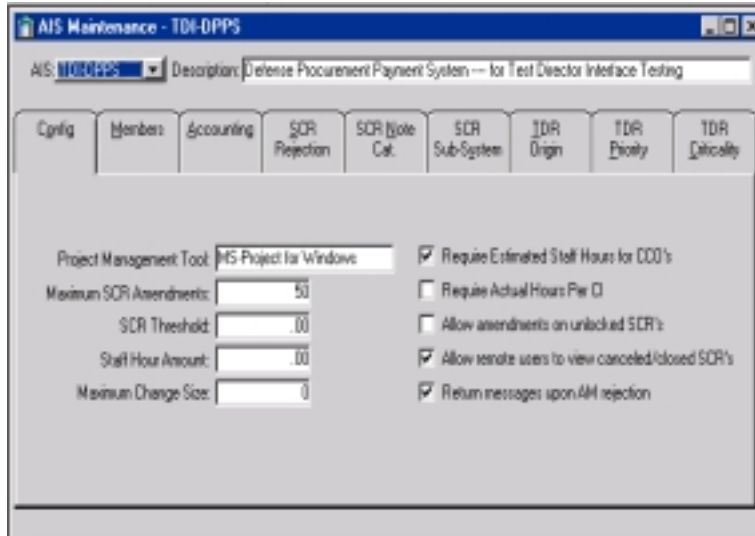


2. Enter the short name or ID for the new AIS in the **AIS** field.
3. Enter a brief description of the new AIS in the **Description** field.
4. Select the **Save** button.

The new AIS and its description will display in the **AIS** and **Description** fields.

After saving the data on the New AIS window, technically, you have finished creating a new AIS. However, usually you will want to add configuration options and default SCR accounting data, grant access to members, specify SCR Rejection Reasons, add SCR Note Categories, and review the TDR Origins list.

5. Select the **Configuration** tab, if it is not already selected.



6. Enter the desired configuration data and check the appropriate boxes.

The **Configuration** tab contains several fields and check boxes that establish parameters for the new AIS. The **Project Management Tool** field identifies the software application used for scheduling. Currently, the only CMIS-supported tool is MS-Project for Windows.

The **Maximum SCR Amendments** specifies the maximum number of unlocked SCR amendments allowed simultaneously for one SCR. The **SCR Threshold** specifies a dollar amount, which if met or exceeded by an SCR, requires Higher Authority approval before the SCR can be locked.

The **Staff Hour Amount** is the cost per hour used to calculate the cost of an SCR. The cost of an SCR is calculated by adding all actual hours for the CCO's, then multiplying this sum by the **Staff Hour Amount**.

The **Maximum Change Size** is the largest number allowed in the System Test Event **Estimated Change Size** and **Actual Change Size** fields and the CCO (configuration change order) **Size of Change** field. If the **Maximum Change Size** value is greater than zero (0), values for these fields are required.

If the **Require Estimated Staff Hours** check box is checked, a value for the **Estimated Staff Hours for CCO's** field is required on CCO's and System Test Events before the SCR can be locked.

If the **Require Actual Hours Per CI** check box is checked, a value for **Actual Staff Hours** is required when the CCO is delivered.

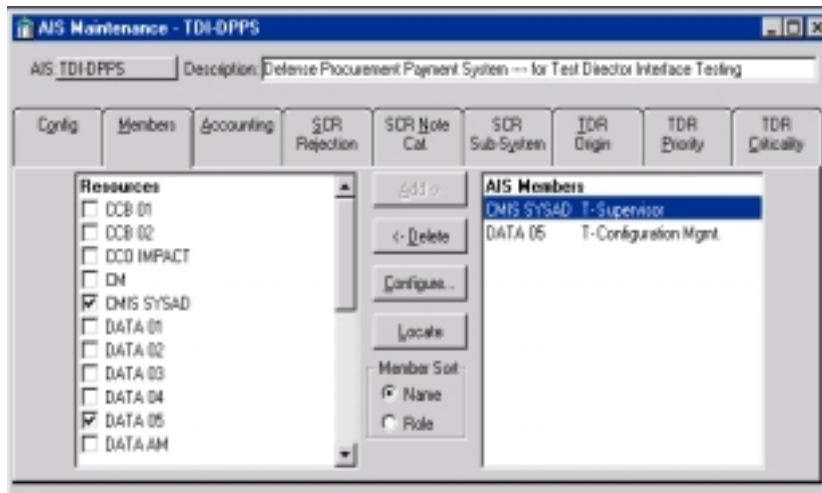
If the **Allow amendments on unlocked SCR's** check box is checked, users can create amendments to unlocked SCR's.

If the **Allow remote users to view canceled/closed SCR's** check box is checked, Remote Users can view SCR's with a **Canceled** or **Certified** status. If this check box is not checked, Remote Users cannot view SCR's with a **Canceled** or **Certified** status.

If the **Return messages upon AM rejection** is checked, the Technical Change Coordinator (TCC) will be notified immediately when an Action Manager rejects a routing. If this check box is unchecked, the TCC will not be notified of an AM rejection until the routing is completed.

After you create a new AIS and set configuration parameters for the AIS, you will need to add resources as AIS members. “Resources” are defined as users of a CMIS application. Resources consist of various user types, each of whom is identified by a user ID and a password. As a CMIS Administrator, you automatically are included as a member of an AIS you create. Until you add other members to the AIS, you are the only user assigned to the AIS.

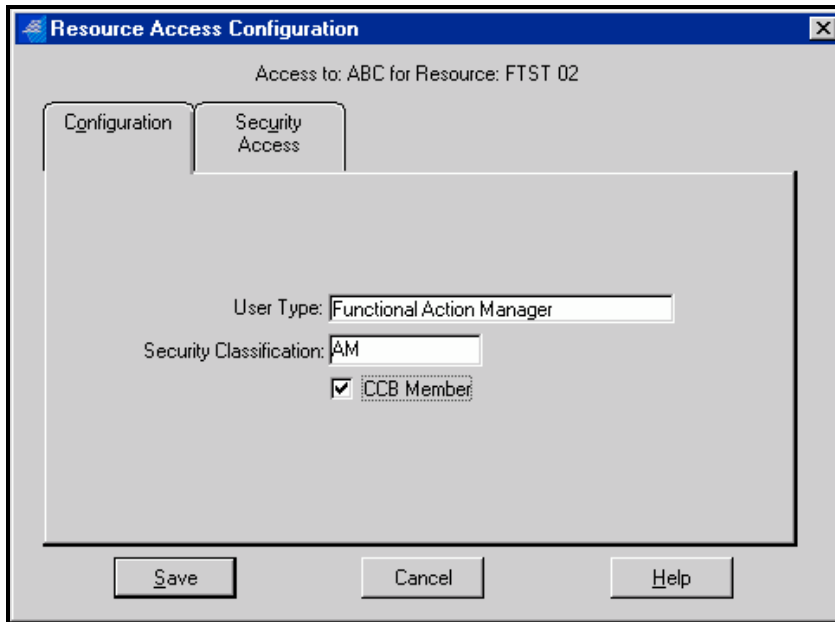
7. Select the **Members** tab.



The **Members** tab contains two lists: **Resources** and **AIS Members**. The **Resources** list on the left contains the user ID's available for assigning to the displayed AIS. Current members of the selected AIS display in the **AIS Members** list on the right. The following controls are available:

- **Add** button: When clicked, the highlighted item in the **Resources** window will be added to the AIS. See item 9 below.
 - **Delete** button: When clicked, the highlighted item in the **AIS Members** window will be deleted from the AIS. See *Steps for Deleting an AIS Member* below.
 - **Locate** button: This button works with the **Resources** or **AIS Members** window when the window has an item selected. When clicked, the user will be prompted to enter part or all of a Resource name or AIS Member name. The system will then scan the selected window and will highlight the first matching item in the window.
 - **Member Sort**: Two options are provided for sorting the **AIS Members** window:
 - **Name**: This option sorts the window in AIS Member name sequence.
 - **Role**: This option sorts the window in AIS Member Role sequence.
8. From the **Resources** list, select the user ID of the resource you wish to add as a member of the displayed AIS.
9. Select the **Add** button.

The Resource Access Configuration window opens. Use this window to identify the resource's role as a member of the selected AIS.



The image shows a screenshot of the 'Resource Access Configuration' window. The window has a title bar with the text 'Resource Access Configuration' and a close button. Below the title bar, there is a subtitle 'Access to: ABC for Resource: FTST 02'. The window contains two tabs: 'Configuration' and 'Security Access'. The 'Configuration' tab is currently selected. Inside the 'Configuration' tab, there are three input fields: 'User Type' with the value 'Functional Action Manager', 'Security Classification' with the value 'AM', and a checked checkbox labeled 'CCB Member'. At the bottom of the window, there are three buttons: 'Save', 'Cancel', and 'Help'.

10. Select the desired user type from the **User Type** drop-down list.
11. Select the appropriate security classification from the **Security Classification** drop-down list.
12. Check the **CCB Member** check box if the user will be a member of the AIS's configuration control board (CCB).
13. Select the **Save** button to save the new AIS member data.

After you save the new member data, the resource you added appears in the **AIS Members** list.

Detailed information on Security Classifications is in Chapter 5, Resource Maintenance and Security Classifications Windows.

14. Select the **Accounting** tab.

15. Make the desired selections from the **Center Code**, **Fund Type**, and **Project Account Code** drop-down lists.
16. Enter the desired data in the **Cost Account Code** and **Account Year** fields.

The data that you enter on the **Accounting** tab will be the default accounting data for SCR's added to the new AIS.

■ Steps for Deleting an AIS Member

1. On the AIS Maintenance window, verify the desired AIS displays in the **AIS** field.
2. Select the **Members** tab.
3. Select the member you wish to delete from the **AIS Members** list.
4. Select the **Delete** button.

A message will ask you to confirm the deletion.

5. Select the **Yes** button to confirm the member deletion or the **No** button to abort the

deletion.

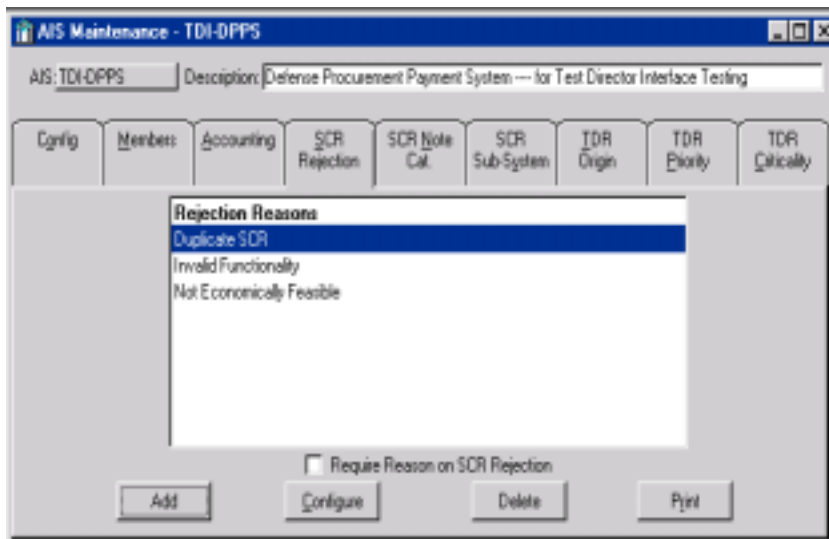
When you delete an AIS member, you are removing that user's assignment to the AIS; you are not removing the user from the CMIS database.

■ Steps for Creating a New SCR Rejection Reason

The **SCR Rejection** tab contains a **Require Reason on SCR Rejection** check box. If this check box is checked, when a user rejects a routing for an SCR in this AIS, the user must choose one of the listed rejection reasons before the SCR can be returned. The **SCR Approval** tab allows user types TCC, Configuration Manager, and CMIS Administrator to create and maintain a list of rejection reasons for the selected AIS's SCR's.

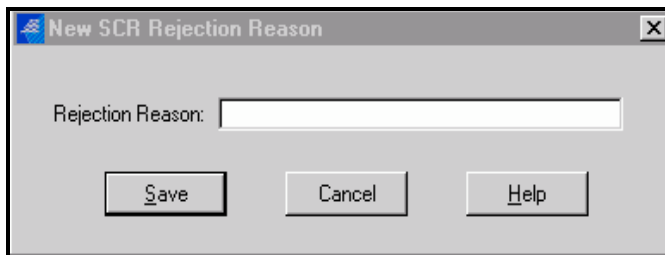
1. On the AIS Maintenance window, verify the desired AIS appears in the **AIS** drop-down list.

Select the **SCR Rejection** tab.



2. Select the **Add** button.

The New SCR Rejection Reason window opens.



3. Enter an SCR rejection reason of up to 30 characters in the **Rejection Reason** field. Select the **Save** button.

CMIS adds the new Rejection Reason to the list.

If users will be required to include rejection reasons when rejecting an SCR, check the **Require Reason on SCR Rejection** box. If specifying a rejection reason is optional when users reject an SCR, ensure the check box is unchecked.

■ ***Steps for Deleting an SCR Rejection Reason***

It may be necessary to delete rejection reasons from the system. For example, a rejection reason concerning lack of funding may become invalid if new funding is approved.

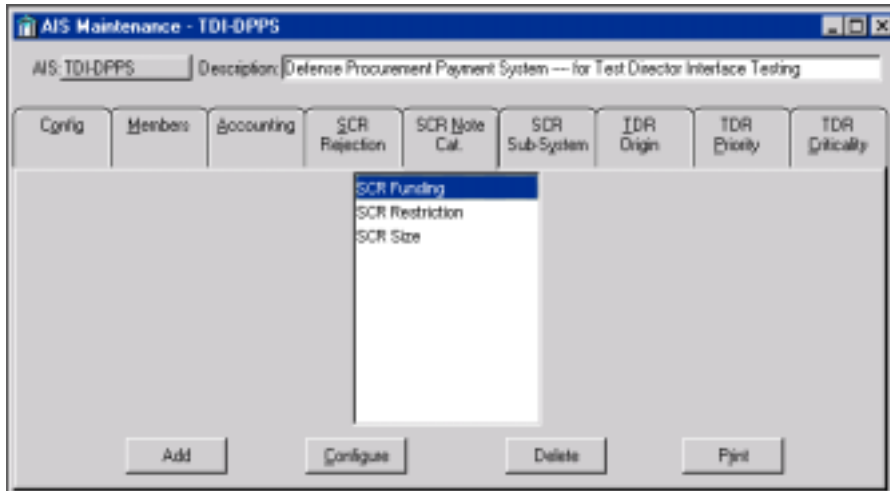
1. On the AIS Maintenance window, verify the desired AIS displays in the **AIS** field.
2. Select the **SCR Approval** tab.
3. Select the rejection reason you wish to delete from the **Rejection Reasons** list.
4. Select the **Delete** button.

A message will display, asking you to confirm the deletion.

5. Select the **Yes** button to delete the rejection reason or the **No** button to abort the process.

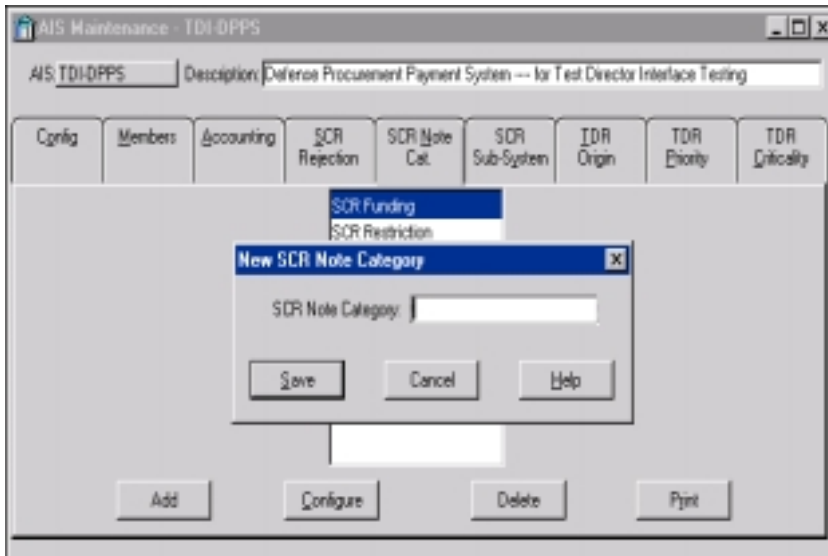
■ ***Steps for Creating a New SCR Note Category***

SCR Notes are useful for internal coordination and information sharing. Users can add, delete, and modify notes from a button on the System Change Request window. From the AIS Maintenance window **SCR Note Cat.** tab, you can create, modify, and delete SCR Note Categories for the selected AIS. If no SCR Note Categories exist for the AIS, users cannot attach notes to SCR's.



1. On the AIS Maintenance window, verify the desired AIS displays in the **AIS** field.
2. Select the **SCR Note Cat.** tab.
3. Select the **Add** button.

The New SCR Note Category window will open.



4. Enter a new category of up to 15 characters in the **SCR Note Category** field.
5. Select the **Save** button.

The new SCR Note Category is added to the list.

■ Steps for Modifying an SCR Note Category

1. On the AIS Maintenance window, verify the desired AIS displays in the **AIS** field.

2. Select the **SCR Note Cat.** tab.
3. From the list of SCR Note Categories, select the one you wish to modify.
4. Select the **Configure** button.

The New SCR Note Category window opens.

5. Modify the value of the **SCR Note Category** field.
6. Select the **Save** button.

■ Steps for Deleting an SCR Note Category

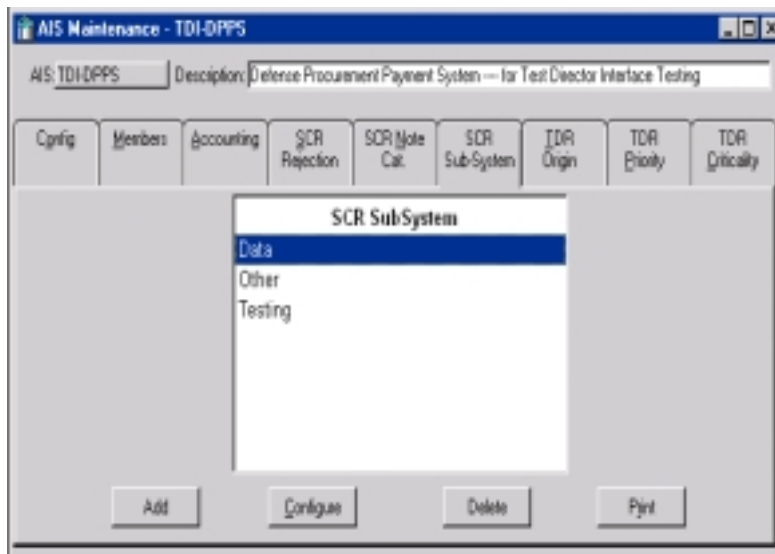
1. On the AIS Maintenance window, verify the desired AIS displays in the AIS drop-down list.
2. Select the **SCR Note Cat.** tab.
3. From the list of SCR Note Categories, select the category you wish to delete.
4. Select the **Delete** button.

A message appears, asking you to confirm the deletion.

5. Select the **Yes** button to delete the item or the **No** button to abort the deletion.

■ Steps for Creating a New SCR Sub-System

The **SCR Sub-System** tab allows user types TCC, Configuration Manager, and CMIS Administrator to create and maintain a list of SCR Sub-Systems for the selected AIS's SCR's. If no SCR Sub-Systems exist for the AIS, users cannot create SCR's.



1. On the AIS Maintenance window, verify the desired AIS displays in the **AIS** field.
2. Select the **SCR Sub-System** tab.
3. Select the **Add** button.

The New SCR Sub-System window will open.

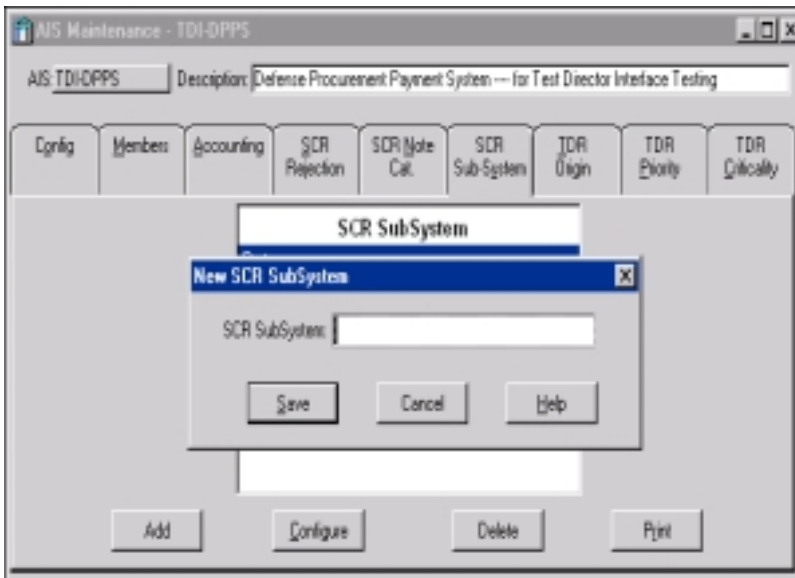
4. Enter a new category of up to 10 characters in the **SCR Sub-System** field.
5. Select the **Save** button.

The new SCR Sub-System is added to the list.

■ Steps for Modifying an SCR Sub-System

1. On the AIS Maintenance window, verify the desired AIS displays in the **AIS** field.
2. Select the **SCR Sub-System** tab.
3. From the list of SCR Sub-Systems, select the one you wish to modify.
4. Select the **Configure** button.

The New SCR Sub-System window opens.



5. Modify the value of the **SCR Sub-System** field.
6. Select the **Save** button.

■ Steps for Deleting an SCR Sub-System

1. On the AIS Maintenance window, verify the desired AIS displays in the AIS drop-down list.

2. Select the **SCR Sub-System** tab.
3. From the list of SCR Sub-Systems, select the category you wish to delete.
4. Select the **Delete** button.

A message appears, asking you to confirm the deletion.

5. Select the **Yes** button to delete the item or the **No** button to abort the deletion.

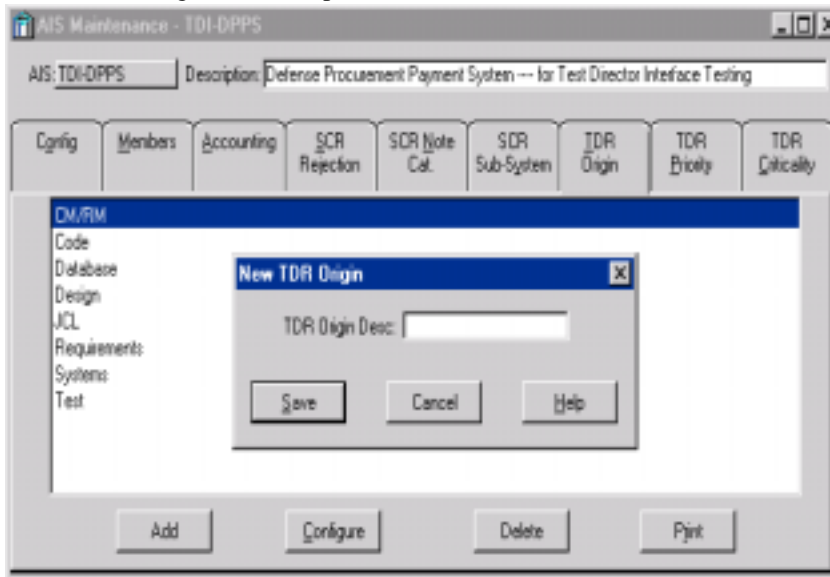
■ Steps for Creating a New TDR Origin

When a tester identifies a problem in an AIS, the problem is recorded in a test deficiency report (TDR). From the AIS Maintenance window **TDR Origin** tab, you can create, modify, and delete TDR origins. The tester uses these values when creating suspected origin TDR's and closing out actual origin TDR's

CMIS provides default values for TDR origins; you can add additional values or delete default values, if you wish. The values you add will be included on the **Suspected Origin** and **Actual Origin** drop-down lists found on the System Testing Add/Configure System TDR window.

1. On the AIS Maintenance window, verify the desired AIS appears in the **AIS** field.
2. Select the **TDR Origin** tab.
3. Select the **Add** button.

The New TDR Origin window opens.



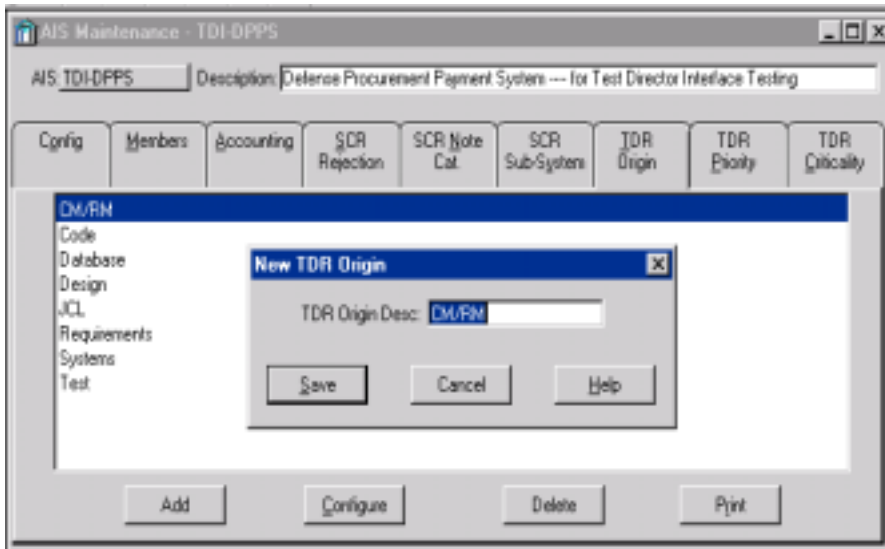
4. In the **TDR Origin Desc** field enter a description of up to 15 characters.
5. Select the **Save** button.

After you select **Save**, the New TDR Origin window will close and the new TDR Origin displays in the list.

■ Steps for Modifying a TDR Origin

1. On the AIS Maintenance window, verify the desired AIS appears in the **AIS** drop-down list.
2. Select the **TDR Origin** tab.
3. Select the TDR Origin you wish to modify.
4. Select the **Configure** button.

The new TDR window opens. The **TDR Origin Desc** field contains the value you selected from the list.



5. Modify the **TDR Origin Desc**.
6. Select the **Save** button.

After you select **Save**, the New TDR Origin window will close and the modified TDR Origin appears in the TDR Origin list.

■ Steps for Deleting a TDR Origin

1. On the AIS Maintenance window, verify the desired AIS appears in the **AIS** drop-down list.
2. Select the **TDR Origin** tab.
3. Select the TDR Origin you wish to remove.
4. Select the **Delete** button.

A message will ask you to confirm the deletion.

5. Select the **Yes** button to complete the deletion or the **No** button to abort the deletion.

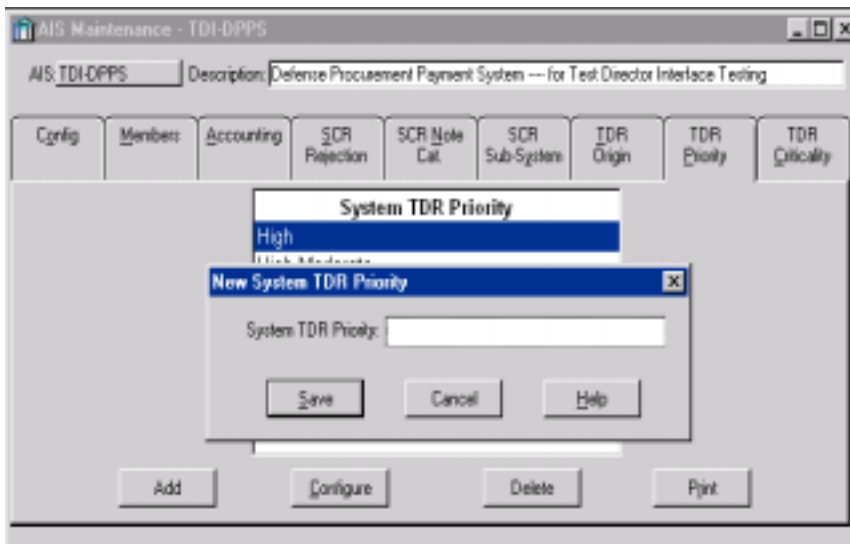
■ Steps for Creating a New TDR Priority

When a tester identifies a problem in an AIS, the problem is recorded in a test deficiency report (TDR). From the AIS Maintenance window **TDR Priority** tab, you can create, modify, and delete TDR Priorities. The tester uses these values when creating System Testing TDR's

CMIS provides default values for TDR Priorities; you can add additional values or delete default values, if you wish. The values you add will be included on **TDR Priority** drop-down lists found on the System Testing Add/Configure System TDR window.

1. On the AIS Maintenance window, verify the desired AIS appears in the **AIS** field.
2. Select the **TDR Priority** tab.
3. Select the **Add** button.

The New TDR Priority window opens.



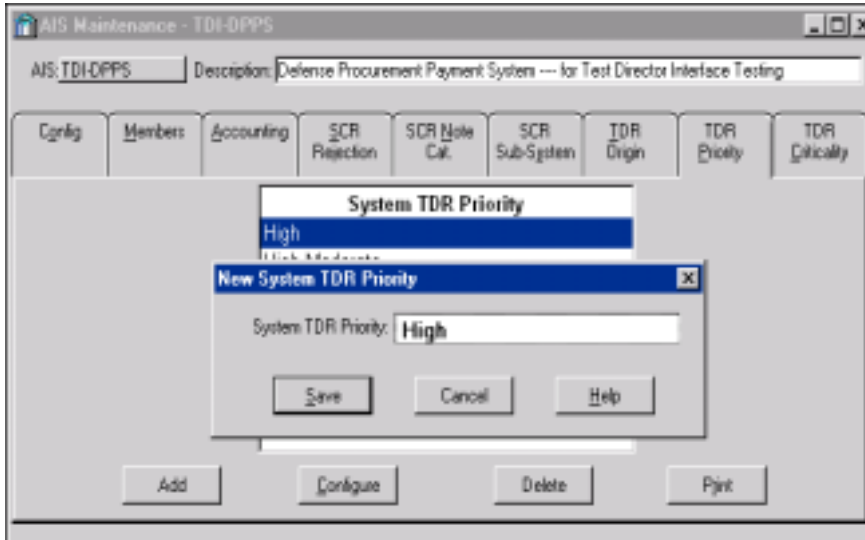
4. In the **TDR Priority Desc** field enter a description of up to 15 characters.
5. Select the **Save** button.

After you select **Save**, the New TDR Priority window will close and the new TDR Priority displays in the list.

■ Steps for Modifying a TDR Priority

1. On the AIS Maintenance window, verify the desired AIS appears in the **AIS** drop-down list.
2. Select the **TDR Priority** tab.
3. Select the TDR Priority you wish to modify.
4. Select the **Configure** button.

The new TDR window opens. The **TDR Priority Desc** field contains the value you selected from the list.



5. Modify the **TDR Priority Desc.**
6. Select the **Save** button.

After you select **Save**, the New TDR Priority window will close and the modified TDR Priority appears in the TDR Priority list.

■ Steps for Deleting a TDR Priority

1. On the AIS Maintenance window, verify the desired AIS appears in the **AIS** drop-down list.
2. Select the **TDR Priority** tab.
3. Select the TDR Priority you wish to remove.
4. Select the **Delete** button.

A message will ask you to confirm the deletion.

5. Select the **Yes** button to complete the deletion or the **No** button to abort the deletion.
6. Select the **Yes** button to complete the deletion or the **No** button to abort the deletion.

■ Steps for Creating a New TDR Criticality

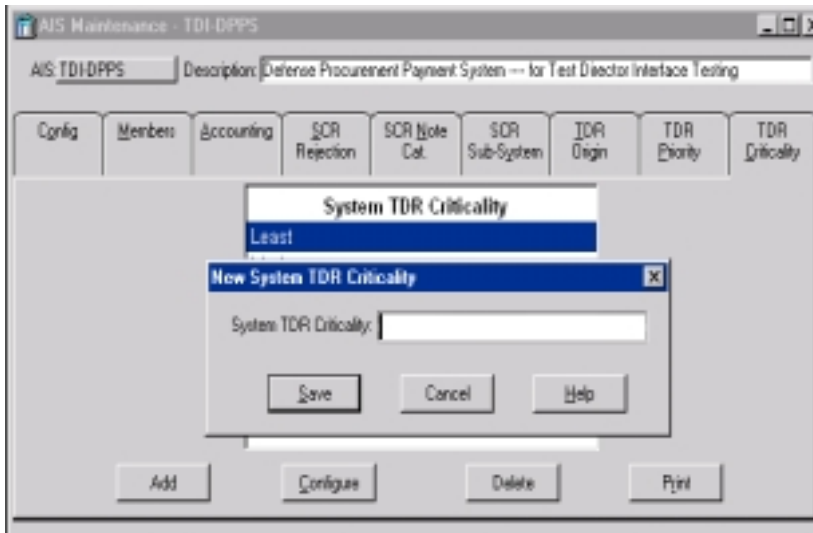
When a tester identifies a problem in an AIS, the problem is recorded in a test deficiency report (TDR). From the AIS Maintenance window **TDR Criticality** tab, you can create, modify, and delete TDR Criticalities. The tester uses these values when creating System Testing TDR's

CMIS provides default values for TDR Criticalities; you can add additional values or delete default values, if you wish. The values you add will be included on **TDR Criticality** drop-down lists found on the System Testing Add/Configure System TDR window.

1. On the AIS Maintenance window, verify the desired AIS appears in the **AIS** field. Select the **TDR Criticality** tab.

2. Select the **Add** button.

The New TDR Criticality window opens.



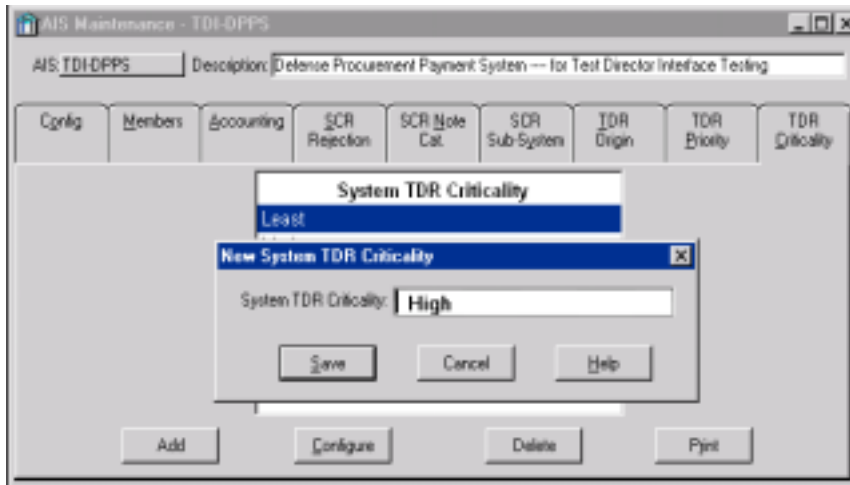
3. In the **TDR Criticality Desc** field enter a description of up to 15 characters.
4. Select the **Save** button.

After you select **Save**, the New TDR Criticality window will close and the new TDR Criticality displays in the list.

■ **Steps for Modifying a TDR Criticality**

1. On the AIS Maintenance window, verify the desired AIS appears in the **AIS** drop-down list.
2. Select the **TDR Criticality** tab.
3. Select the TDR Criticality you wish to modify.
4. Select the **Configure** button.

The new TDR window opens. The **TDR Criticality Desc** field contains the value you selected from the list.



5. Modify the **TDR Criticality Desc**.
6. Select the **Save** button.

After you select **Save**, the New TDR Criticality window will close and the modified TDR Criticality appears in the TDR Criticality list.

■ Steps for Deleting a TDR Criticality

1. On the AIS Maintenance window, verify the desired AIS appears in the **AIS** drop-down list.
2. Select the **TDR Criticality** tab.
3. Select the TDR Criticality you wish to remove.
4. Select the **Delete** button.

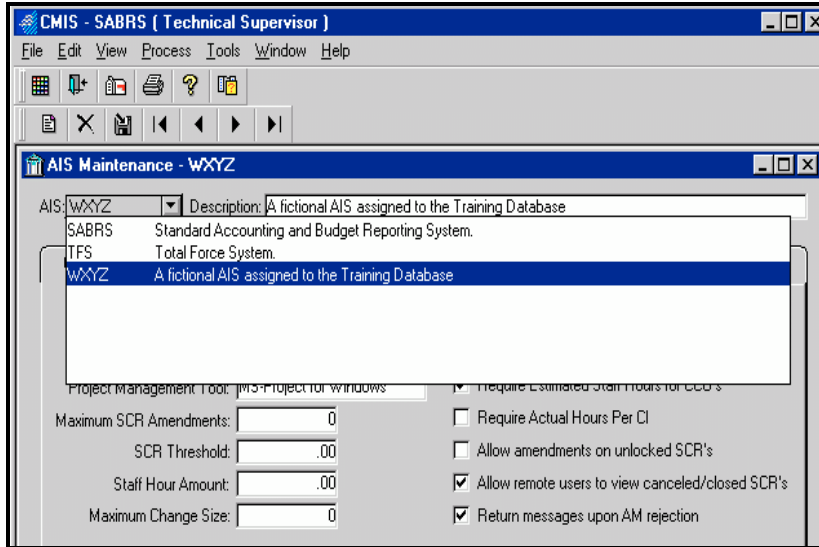
A message will ask you to confirm the deletion.

5. Select the **Yes** button to complete the deletion or the **No** button to abort the deletion.

■ Steps for Deleting an AIS

It may become necessary to delete an AIS from CMIS. For example, you may need to remove an old system that has been replaced by a newer system or delete a system that was added to CMIS for testing purposes only.

1. On the AIS Maintenance window, select the **AIS** drop-down list.



The **AIS** drop-down list contains a list of all AIS's currently in CMIS.

2. Select the AIS you wish to delete.
3. Select the **Delete** toolbar button. (You could also select the **File** menu **Delete** item.)

A message will ask you to confirm the deletion.

4. Select the **Yes** button to delete the AIS or the **No** button to abort the deletion.

The **AIS** drop-down list no longer will contain the name of the deleted AIS.

When you delete an AIS from CMIS, the AIS configuration settings are destroyed and the assigned members will be unassigned, but CMIS will retain most of the AIS data although it will be inaccessible. If you add the deleted AIS later, much of the data will become accessible again.

Chapter 5 - Resource Maintenance and Security Classifications Windows



Overview

This chapter discusses two related CMIS windows, the Resource Maintenance window and the Security Classifications window. These two windows define and control AIS user types in CMIS and the access rights of the various users. This chapter also addresses changing CMIS user ID's and passwords via the Change ID/Password window.

The Resource Maintenance window provides options for creating, modifying, and deleting CMIS users. Most options are available only to the CMIS Administrator. The Resource Maintenance window is divided into the following tabs:

Configuration Tab

Contains basic information about the selected resource.

AIS Tab

Displays a list of assigned roles for the selected resource and a list of automated information systems (AIS's) to which the resource can be assigned. From the **AIS** tab, you can open the Resource Access Configuration window to define, modify, or delete the selected resource's AIS access settings.

Designate Acting Tab

Allows authorized users to assign resources to act on their behalf.

Acting Assignments Tab

Allows users to view their acting assignments.

Unavailability Tab

Allows users to enter unavailability information.

The Security Classifications window allows the CMIS Administrator to create, modify, and delete security classes.

Restrictions

- Only user type CMIS Administrator can add new resources, add and modify resource access configuration data, and change user ID's.
- Only user type CMIS Administrators can add, modify, and delete CMIS security classes.
- Access to other options on the Resource Maintenance window depends on the user's security classification and user type.



Resource Maintenance and Security Classifications Windows Options

- **Create a New Resource**

- **Add/Modify Resource AIS Access**
- **Create/Modify Acting Assignment**
- **Add/Modify Resource Unavailability**
- **Reassign a Resource**
- **Change a User ID**
- **Change Your Password**
- **Create/Modify Security Class**

■ **Steps for Creating a New Resource**

1. From the main CMIS window, select **Resource Maintenance** from the **Process** menu.

The Resource Maintenance window opens.

The screenshot shows the 'Resource Maintenance - CM' window. At the top, there's a menu bar with 'File', 'Edit', 'View', 'Process', 'Tools', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main window area has a title bar 'Resource Maintenance - CM'. Inside, there's a form with several fields: 'Resource: CM' and 'Name: Configuration Manager' at the top. Below these are five tabs: 'Configuration', 'AIS', 'Designate Acting', 'Acting Assignments', and 'Unavailability'. The 'Configuration' tab is selected. It contains the following fields: 'NDS:' with a text box, 'Code:' with a text box, 'Activity:' with a text box, 'UIC:' with a text box and a checkbox labeled 'Display Canceled/Certified SCR's', 'External E-Mail Logon ID:' with a text box, 'External E-Mail Address:' with a text box, and 'Mail Interval:' with a text box containing the number '3' and a small icon. At the bottom of the window, there's a status bar that says 'The Employing Activity's UIC Code'.

2. Select the **New** toolbar button.

The New Resource window opens.

The screenshot shows a 'New Resource' dialog box with the following fields and values:

- Resource: BNELSON
- Name: Robert Nelson
- NDS: RDNELSON
- Code: SAA
- Activity: SEOPE Pensacola
- UIC: 68142
- External E-Mail Logon ID: (empty)
- External E-Mail Address: (empty)
- Mail Interval: 0

Buttons at the bottom: Save, Cancel, Help.

3. Enter the required user ID of up to 10 characters in the **Resource** field.
4. Enter the new resource's full name of up to 30 characters in the required **Name** field.
5. Enter the Novell Directory Services ID of up to 30 characters in the **NDS** field. (This value is the same as the CMIS Logon ID).
6. Enter the resource's organizational code of up to four characters in the required **Code** field.
7. Enter the new resource's employee activity name of up to 19 characters in the required **Activity** field.
8. Enter the activity's five-digit Unit Identification Code (UIC) in the required **UIC** field, if available; otherwise, enter any single letter for the UIC field.

If you attempt to save the New Resource data without entries in all required fields, CMIS will prompt you for the missing data.

If you wish, you can enter data in the optional **External E-Mail Logon ID**, **External E-Mail Address**, and **Mail Interval** fields.

The **External E-mail Logon ID** field contains the ID the user uses to connect to an external e-mail system. Leaving this field blank will not necessarily prevent the user's CMIS mail messages from being sent to other users via the external e-mail interface. If a valid e-mail session exists (i.e., the user is logged onto Microsoft Exchange/Outlook) when the user logs onto CMIS, CMIS will use the existing e-mail session.

The **External E-Mail Address** field contains the address to which copies of CMIS mail will be sent. If this field is blank, this user will not receive any CMIS mail via the external e-mail system. If you make an entry in the **External E-Mail Address** field, you can format your entry for a specific e-mail application or as an Internet address.

The value in the **Mail Interval** field indicates how frequently CMIS checks for the user's incoming and outgoing mail messages. To prevent CMIS mail from being sent via the external e-mail interface, the interval must be set to **0** (zero).

9. Select the **Save** button.

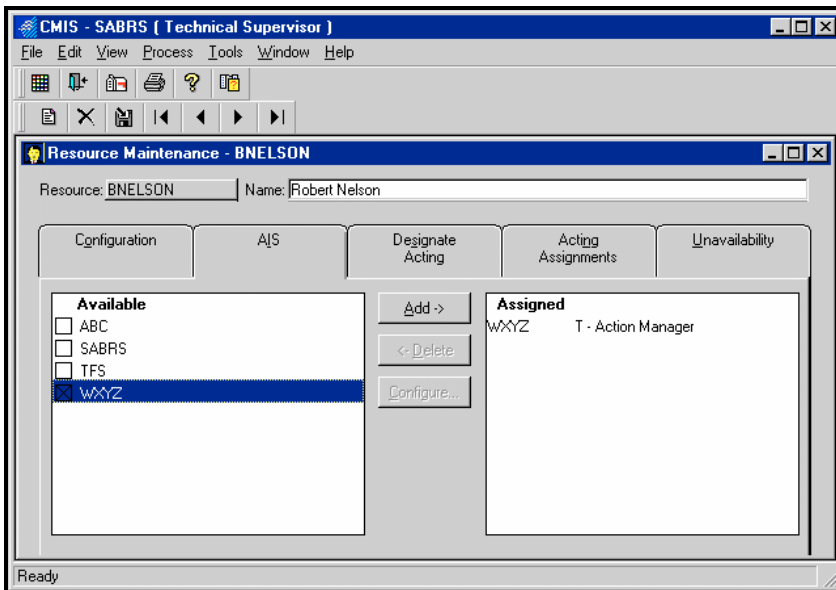
After you save the new data, the New Resource window will close and the Resource Maintenance window will display data for the resource you just added.

10. Check the **Configuration** tab **Display Certified/Canceled SCR's** box if you want the new resource to be able to view certified and canceled SCR's.

If you wish, you can now add and modify AIS access for the new resource.

■ Steps for Adding/Modifying Resource AIS Access

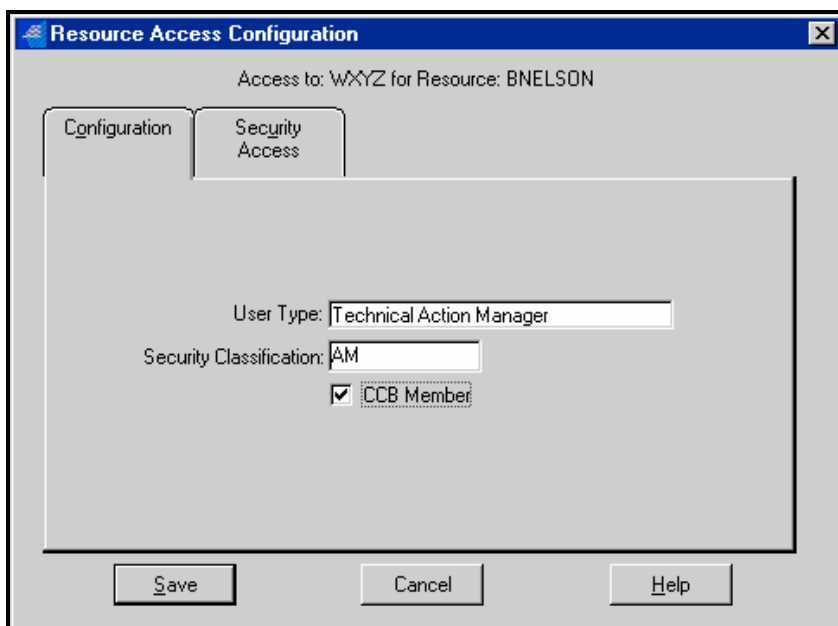
1. On the Resource Maintenance window, verify the desired resource displays in the **Resource** field.
2. Select the **AIS** tab.



The **AIS** tab contains two lists: **Available** and **Assigned**. The **Available** list contains the AIS's to which you can assign the selected resource. An **X** in the AIS check box indicates the resource is currently assigned to that AIS. The **Assigned** list shows the current AIS assignment(s) and user type(s) for the selected resource.

3. Select the desired AIS from the **Available** list.
4. Select the **Add** button.

The Resource Access Configuration window opens.



5. Select the desired user type from the **User Type** drop-down list.
6. Select the appropriate security classification from the **Security Classification** drop-down list.
7. Check the **CCB Member** box if the resource will be a member of the AIS's configuration control board (CCB).
8. Select the **Save** button.

After you select **Save**, the Resource Access Configuration window closes, and the AIS and user type you assigned the new resource display on the **AIS** tab **Assigned** list. Now that the new resource has been assigned access to an AIS, you can enter additional AIS access information for that resource.

9. Select the desired resource from the **Assigned** field. Note that this action enables the **Delete** and **Configure** buttons.

If you wanted to delete a resource's access to an AIS, you would select the desired resource's AIS assignment from the **Assigned** list, then select the **Delete** button.

10. Select the **Configure** button.

The Resource Access Configuration window opens, now displaying five tabs.

The screenshot shows the 'Resource Access Configuration' window with the title bar 'Resource Access Configuration'. Below the title bar, it says 'Access to: WXYZ for Resource: BNELSON'. There are five tabs: 'Configuration' (selected), 'Structure', 'Security Access', 'Routing', and 'Action Managers'. The main area contains the following fields and controls:

- User Type:
- Security Classification:
- ☒ CCB Member

At the bottom are three buttons: 'Save', 'Cancel', and 'Help'.

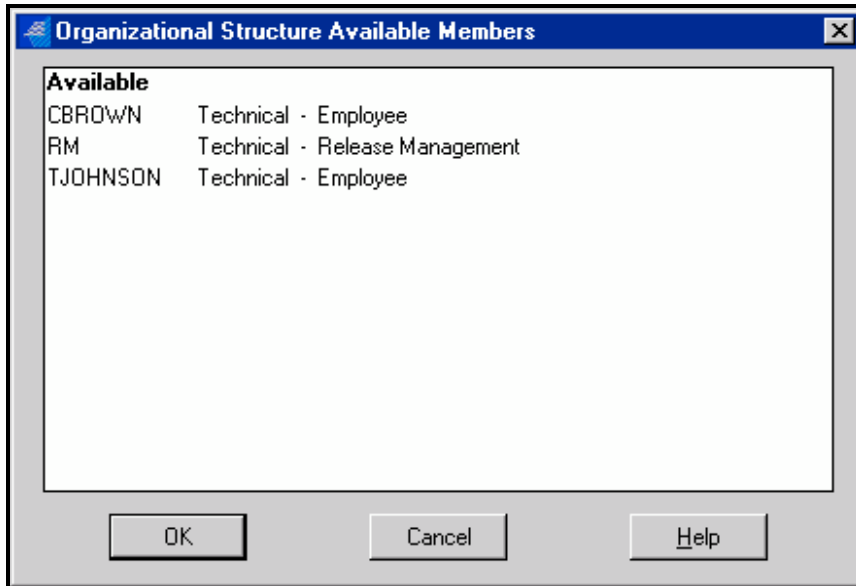
11. Select the **Structure** tab.

The screenshot shows the 'Resource Access Configuration' window with the 'Structure' tab selected. The main area is titled 'Assigned' and contains an empty list box. Below the list box are two buttons: 'Add...' and 'Delete'. At the bottom are three buttons: 'Save', 'Cancel', and 'Help'.

The **Structure** tab identifies the Action Manager/Employee and Action Manager/Release Manager relationships for the selected resource AIS assignment. Structure is oriented to organization type. If the selected resource is a Technical Action Manager or Technical Action Manager-Change Coordinator, the **Structure** list will contain Technical Employees and Technical Release Managers who are members of the same AIS. If the selected resource is a Functional Action Manager or Functional Action Manager-Change Coordinator, the **Structure** list will contain Functional Employees and Functional Release Managers.

12. Select the **Add** button

The Organizational Structure Available Members window opens. Because the resource is a Technical Action Manager, only technical user types display as available members.



13. Select each resource you wish to add to the selected resource's AIS structure.

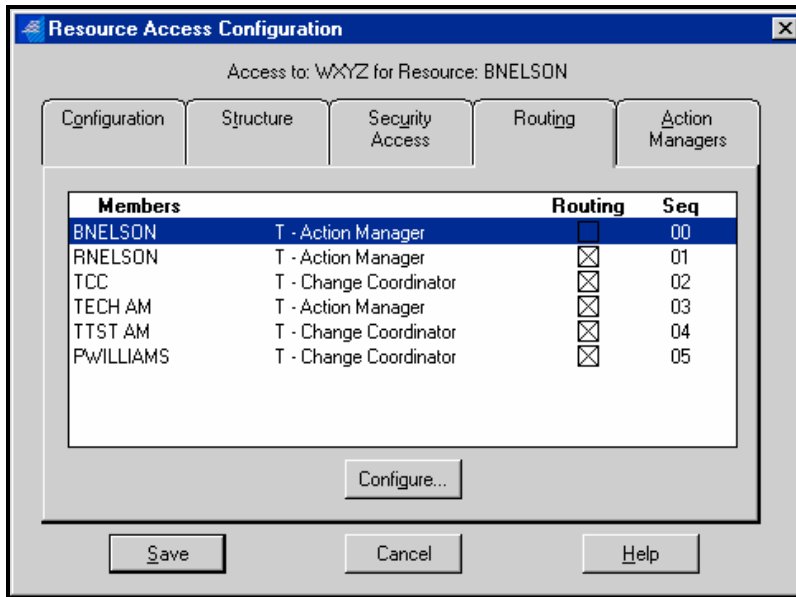
14. When you have completed your selections, select the **OK** button.

After you select **OK**, the Organizational Structure Available Members window closes and the resources you added as structure members now appear in the **Structure** tab **Assigned** list.

If you wish, you can remove a member from the structure by selecting the desired member from the **Assigned** list, then selecting the **Delete** button.

The Resource Access Configuration window **Routing** tab contains SCR routing information for Action Manager, Change Coordinator, and Action Manager-Change Coordinator user types for the selected AIS.

15. Select the **Routing** tab.



Resources with no routing are at the top of the list, have an empty **Routing** check box, and a **Seq** number of **00**.

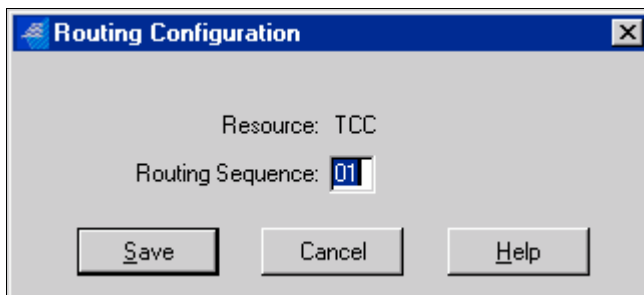
Tip When the selected resource is a Release Manager, the **Routing** tab **Members** list will display all Release Managers for the current AIS. The Release Manager at the top of the list is the primary Release Manager while all others listed are alternate Release Managers.

16. Select the check box of the resource for whom you are adding routing information.

After you enable the **Routing** check box for the resource, that resource's routing sequence defaults to the first (**01**) position. There are two methods for changing the sequence order. You can use drag-and-drop editing, which allows you to click on the desired resource and, holding down the left mouse button, drag the resource to the desired position. You can also modify the routing sequence using the **Configure** button.

17. Select the **Configure** button.

The Routing Configuration window opens.



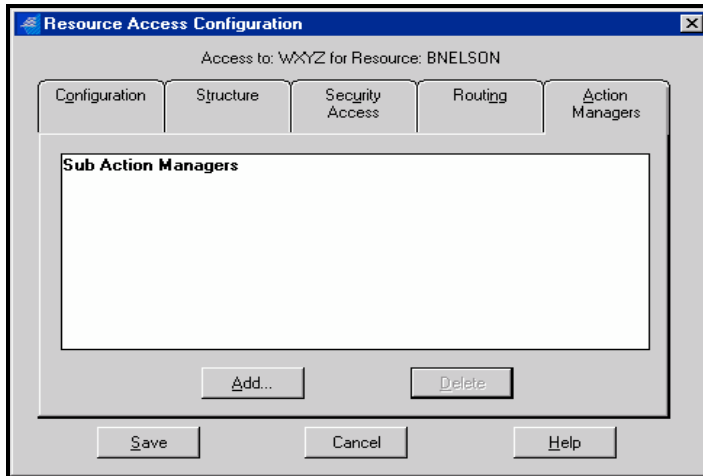
18. Enter the desired value (**01-99**) in the **Routing Sequence** field.

19. Select the **Save** button.

The Routing Configuration window closes and the resource moves to the routing sequence position you identified.

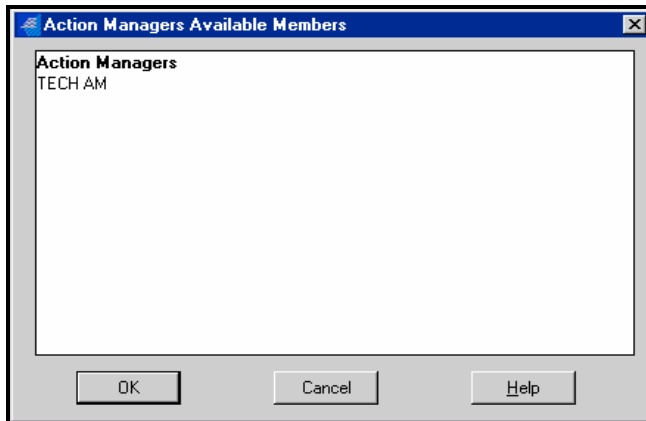
The Resource Access Configuration window **Action Managers** tab provides additional SCR forwarding information for user types Action Manager and Action Manager-Change Coordinator.

20. Select the **Action Managers** tab.



21. Select the **Add** button.

The Action Managers Available Members window opens.



22. Select each Action Manager you wish to designate as a Sub Action Manager.

23. Select the **OK** button.

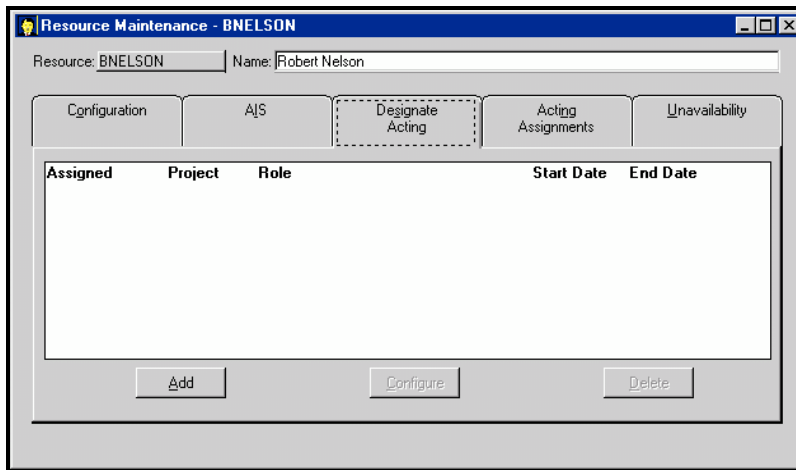
The Action Managers Available Members window closes, and the **Action Managers** tab **Sub Action Managers** list includes any resource you designated as a Sub Action Manager.

If you wish to delete the Sub Action Manager designation for a resource, select the desired Sub Action Manager from the **Sub-Action Managers** list, then select the **Delete** button.

■ **Steps for Creating/Modifying an Acting Assignment**

The **Designate Acting** tab allows authorized users to assign resources to act on their behalf. Acting resources can access CMIS and perform many of the same functions as the resources for whom they are acting. When you have been assigned to act on behalf of another user, you will receive a mail message informing you of the acting assignment.

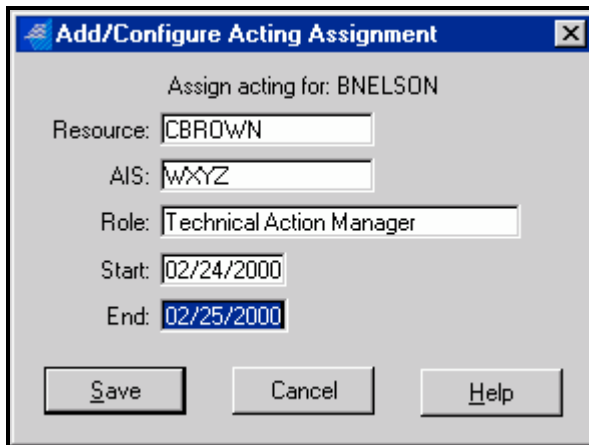
1. On the Resource Maintenance window, select from the **Resource** drop-down list the resource for whom you are going to designate an acting resource.
2. Select the **Designate Acting** tab.



The screenshot shows the 'Resource Maintenance - BNELSON' window. At the top, there are fields for 'Resource: BNELSON' and 'Name: Robert Nelson'. Below these are five tabs: 'Configuration', 'AIS', 'Designate Acting' (which is selected and has a dashed border), 'Acting Assignments', and 'Unavailability'. The 'Designate Acting' tab contains a table with columns: 'Assigned', 'Project', 'Role', 'Start Date', and 'End Date'. The table is currently empty. At the bottom of the window are three buttons: 'Add', 'Configure', and 'Delete'.

3. Select the **Add** button.

The Add/Configure Acting Assignment window opens.



The screenshot shows the 'Add/Configure Acting Assignment' window. It has a title bar with a close button. Inside, it says 'Assign acting for: BNELSON'. There are five input fields: 'Resource:' with 'CBROWN', 'AIS:' with 'WXYZ', 'Role:' with 'Technical Action Manager', 'Start:' with '02/24/2000', and 'End:' with '02/25/2000'. At the bottom are three buttons: 'Save', 'Cancel', and 'Help'.

4. From the **Resource** drop-down list, select the resource who will be acting.
5. Select the desired AIS from the **AIS** drop-down list.
6. Select the desired role for the acting assignment from the **Role** drop-down list.
7. Enter the start date of the acting assignment in the **Start** field.
8. Enter the end date of the acting assignment in the **End** field.
9. Select the **Save** button.

The Add/Configure Acting Assignment window closes, and the new acting assignment displays in the **Designated Acting** tab list.

You also can modify acting assignment data.

10. Select the desired acting assignment from the **Designate Acting** tab list.
11. Select the **Configure** button.

The Add/Configure Acting Assignment window opens.

12. Select the desired resource from the **Resource** drop-down list.
13. Modify the acting assignment data as desired.
14. Select the **Save** button.

After you save your changes, the Add/Configure Acting Assignment window closes and you can see your changes in the **Designate Acting** tab list.

You can delete an acting assignment by selecting the desired acting assignment from the **Designate Acting** tab list, then selecting the **Delete** button.

■ **Steps for Adding and Modifying Resource Unavailability**

The **Unavailability** tab allows you to enter the dates you will be unavailable and the reason for your unavailability. If you are an Action Manager or Action Manager-Change Coordinator, you can enter unavailability for yourself or your employees. Release Managers, Employees, and Change Coordinators can enter unavailability information only for themselves.

1. On the Resource Maintenance window, select the desired resource from the **Resource** drop-down list.
2. Select the **Unavailability** tab.

3. Select the **Add** button.

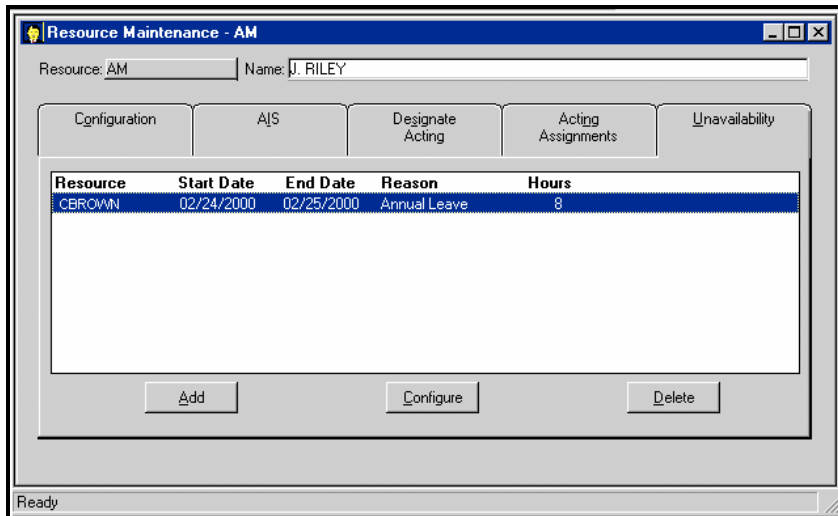
The Add/Configure Unavailability window opens.

4. Select the desired resource from the **Resource** drop-down list.
5. Select the reason for unavailability from the **Reason** drop-down list.
6. Enter the date the unavailability period will begin in the **Start** field.
7. Enter the last date of the unavailability period in the **End** field.
8. Enter the number of hours of unavailability in the **Hours** field.
9. Select the **Save** the button.

After you select **Save**, the Add/Configure Unavailability window will close and the information you added will display in the **Unavailability** tab list.

In addition to adding new unavailability information, you also can modify existing unavailability data.

10. Select the desired resource. The **Configure** and **Delete** buttons enable.



11. Select the **Configure** button.

The Add/Configure Unavailability window opens.

12. Select the desired resource from the **Resource** drop-down list.

13. Change the desired unavailability data.

14. Select the **Save** button.

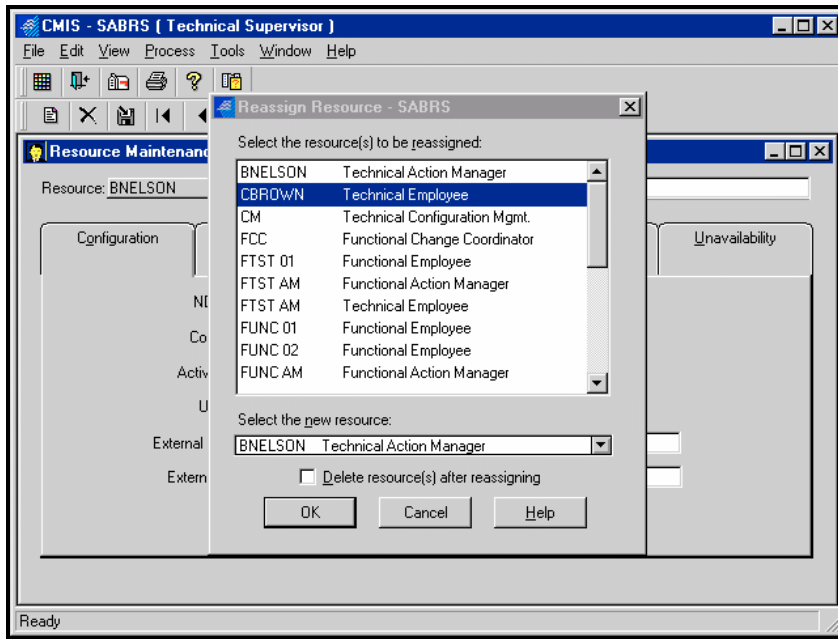
After you select **Save**, the Add/Configure Unavailability window closes and your changes display in the **Unavailability** tab list. You can delete unavailability data for a resource by selecting the desired row of unavailability data, then selecting the **Delete** button.

■ Steps for Reassigning a Resource

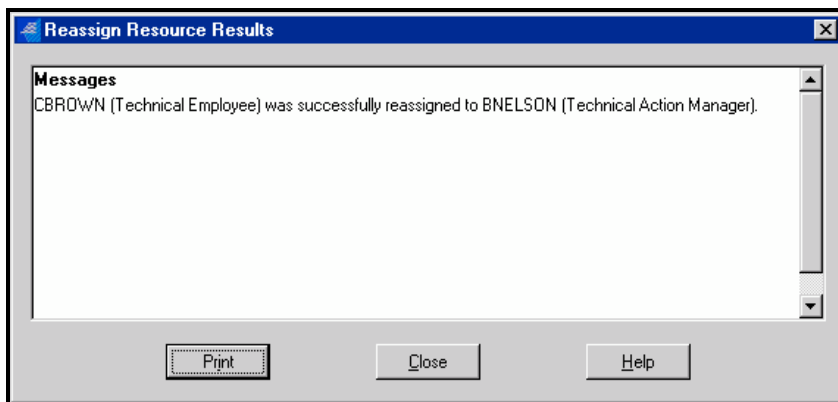
The Reassign Resource window allows CMIS Administrator and Configuration Manager user types to shift an AIS work assignment when the resource to whom the work was assigned is being removed from the AIS. When a resource's work is reassigned, all the work assignments for that resource will be assigned to the new resource. Any work assignments for configuration change orders (CCO's), SCR approvals, system testing events, system testing routings, test deficiency reports, system and SCR testing configuration items (CI's), and associated mail messages will shift to the newly assigned resource.

1. On the Resource Maintenance window, select the desired resource from the **Resource** drop-down list.
2. Select **Reassign Resource** from the **Tools** menu.

The Reassign Resource window opens.



3. From the **Select the resource(s) to be reassigned** drop-down list, select the resource whose workload you are reassigning.
4. From the **Select the new resource** drop-down list, select the resource being assigned the workload
5. If the resource whose workload is being reassigned is to be deleted from the AIS, check the **Delete resource(s) after reassigning** box.
6. Select the **OK** button.



The Reassign Resource Results window opens, displaying a message indicating whether the desired reassignment was successful.

■ Steps for Changing a User ID

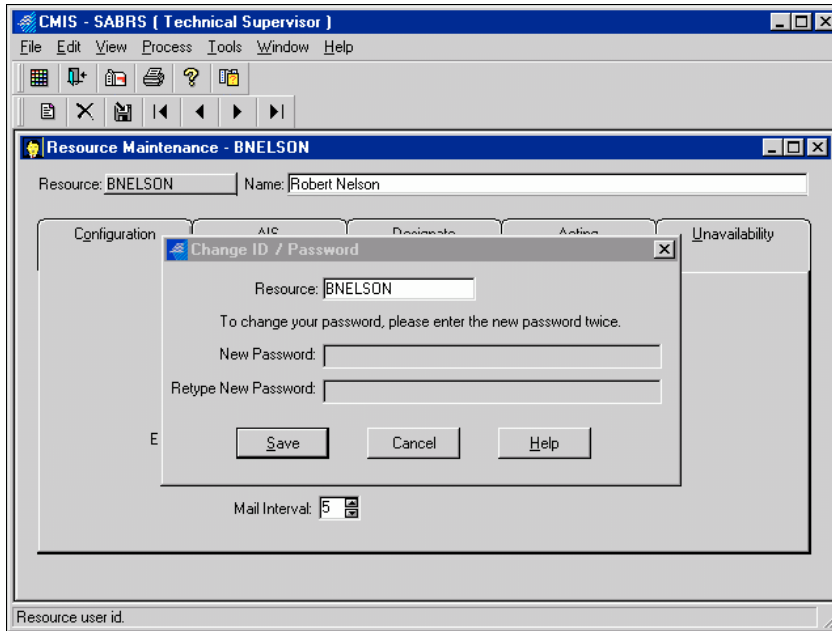
Only a CMIS Administrator can change a user ID.

1. On the Resource Maintenance window, select the desired resource from the **Resource** drop-down list.

- From the Resource Maintenance window, select **Change ID/Password** from the **Edit** menu.

NOTE The **Edit** menu **Change ID/Password** item is only available when you have the Resource Maintenance window open.

The Change ID/Password window opens.



- Enter the new user ID of up to 10 characters in the **Resource** field.
- Select the **Save** button.

The Change ID/Password window will close. The new ID will be in effect the next time the user logs onto CMIS.

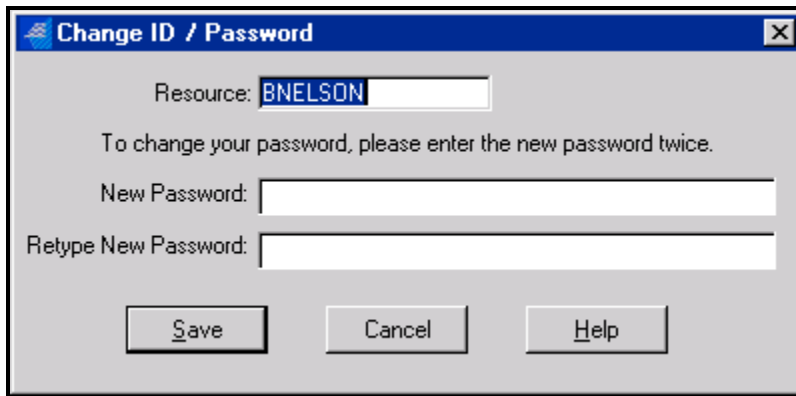
■ Steps for Changing Your Password

All CMIS users can change their own passwords. No user can change the password of another user.

- From the Resource Maintenance window, select **Change ID/Password** from the **Edit** menu.

NOTE The **Edit** menu **Change ID/Password** item is only available when you have the Resource Maintenance window open.

The Change ID/Password window opens.



2. Enter your new password of up to 30 characters in the **New Password** field. Your password can contain only letters and numbers and cannot begin with a number.
3. Reenter the new password in the **Retype New Password** field.
4. Select the **Save** button.

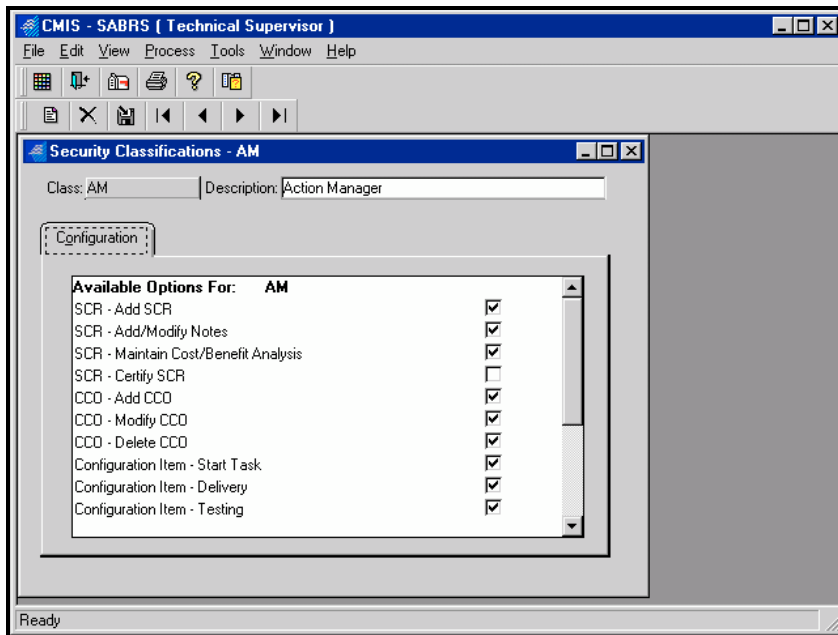
The Change ID/Password window will close. Your new password will be in effect the next time you log onto CMIS.

■ ***Steps for Creating/Modifying a Security Class***

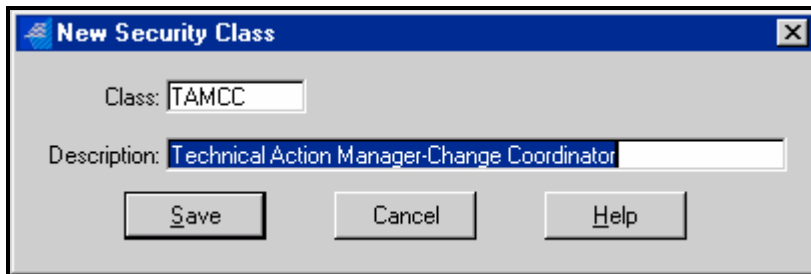
A CMIS user's user type defines a set of actions that user can perform. A security class further defines the user's CMIS access rights. Every CMIS user's access to various system functions depends on both the user's type and security class.

1. Select Security Classifications from the Process menu.

The Security Classifications window opens.



2. Select the **New** toolbar button.



The New Security Class window opens.

3. Enter a security classification ID in the **Class** field.

Chapter 6 - Internal Mail System

Overview

The CMIS Internal Mail System allows users to send and receive on-line messages. The Internal Mail System window has four tabs: **Configuration**, **To Do List**, **Notify**, and **Groups**.

The **Configuration** tab identifies your mail login name and how frequently you wish to have the CMIS application check for and send messages to the external mail interface. The **Notify** tab contains messages other users have sent to you, and CMIS generated messages, which may or may not require action by the recipient. The **To Do List** tab lists contains CMIS-generated messages. You cannot explicitly delete CMIS-generated messages; CMIS deletes a **To Do List** message after you complete the action the message requires. The **Group** tab allows you to maintain mail groups.

Restrictions

- Access to mail processes is unrestricted for authorized users of CMIS.

Internal Mail System Window Options

Create a Mail Group

Create and Send a Mail Message

Configure CMIS Mail to Interface with an External Mail System

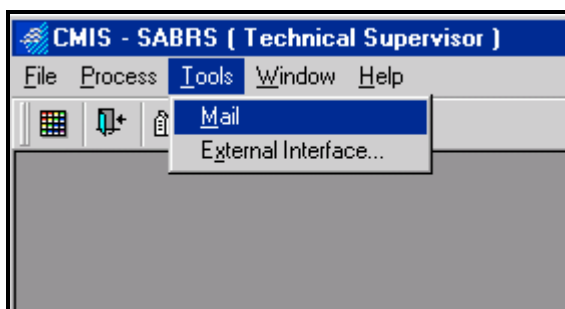
Display To Do List Message

Display Notify Messages

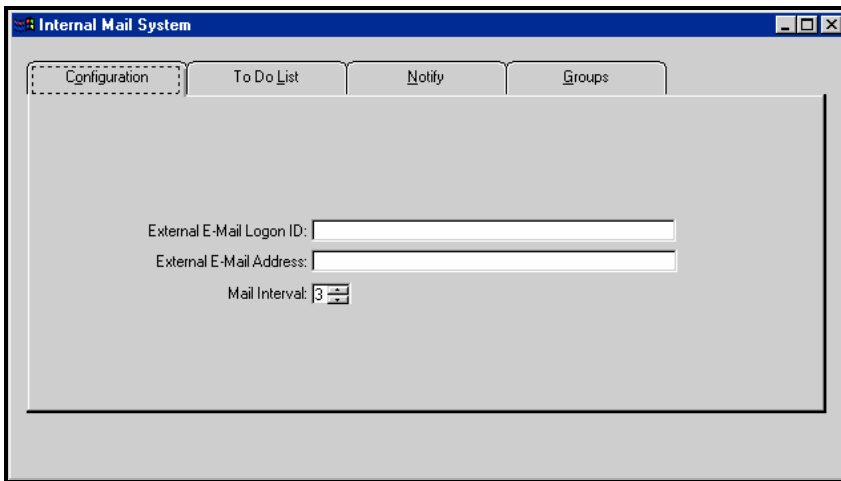
Forward a Message

Print Mail Reports

To open the Internal Mail System window, select **Mail** from the **Tools** menu. You can also select the **Mail** toolbar button.



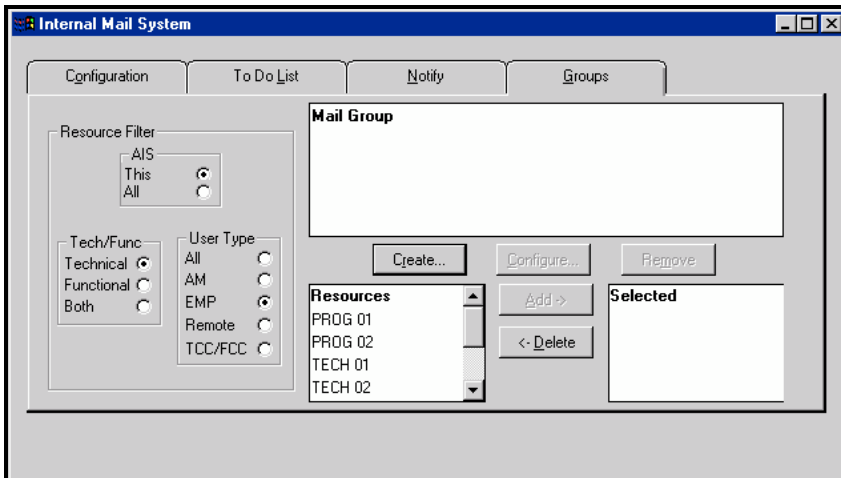
The Internal Mail System window opens.



■ Steps for Creating a Mail Group

An efficient method of sending mail to a specific group of resources is to use mail groups. If you routinely send mail to the same group of people, you can create a mail group so you do not have to select each message recipient individually each time you send them a message. For example, a technical Action Manager (AM) can create a mail group that contains all technical Employees who are members of that AM's structure.

1. Select the Internal Mail System window **Groups** tab.



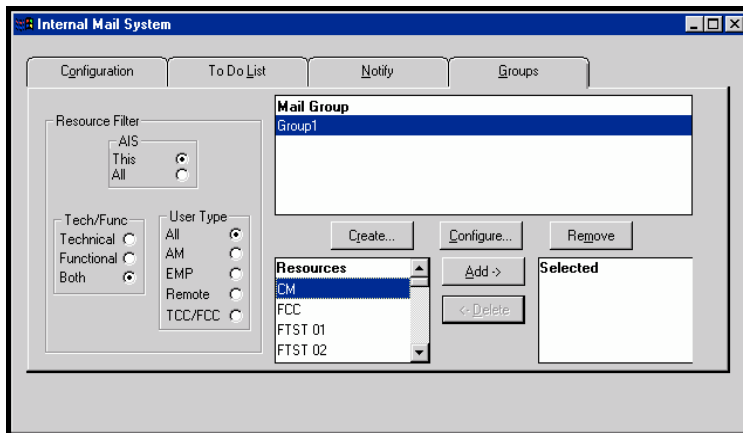
2. Select the **Create** button.

The Add/Configure Mail Group window opens.



3. Enter the name of the new group in the **Group ID** field.
4. Select the **Save** button.

The new mail group name appears in the **Mail Group** list. After creating the group name, you will want to add members to the group.



5. Select the desired group name from the **Mail Group** list.
6. For each resource you wish to add to the mail group, select the desired resource ID from the **Resources** list, then select the **Add** button. You can also double-click on each desired ID. The selected resource ID(s) will display in the **Selected** list.

You can use the **Resource Filter** radio buttons to change the contents of the **Resources** list. By default, only the resources assigned to the current AIS display in the **Resources** list. You can display all available resources by selecting the **Resource Filter AIS All** radio button. You also can filter by technical and functional resources by selecting the desired **Tech/Func** radio button. To filter by user type, select the desired **User Type** radio button.

You can remove a resource from a mail group by selecting the desired resource ID from the **Selected** list, then selecting the **Delete** button. To delete a mail group, select the desired mail group name from the **Mail Group** list, then select the **Remove** button.

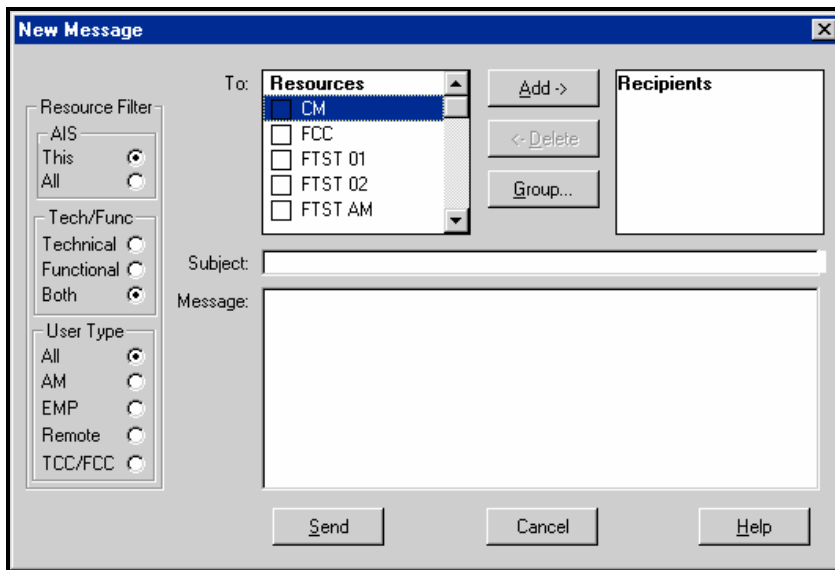
NOTE These mail groups may also be used when forwarding SCR's.

■ Steps for Creating and Sending a Mail Message

1. From the Internal Mail System window, select the **New** toolbar button. You also can

select the **File** menu **New** item.

The New Message Window opens.

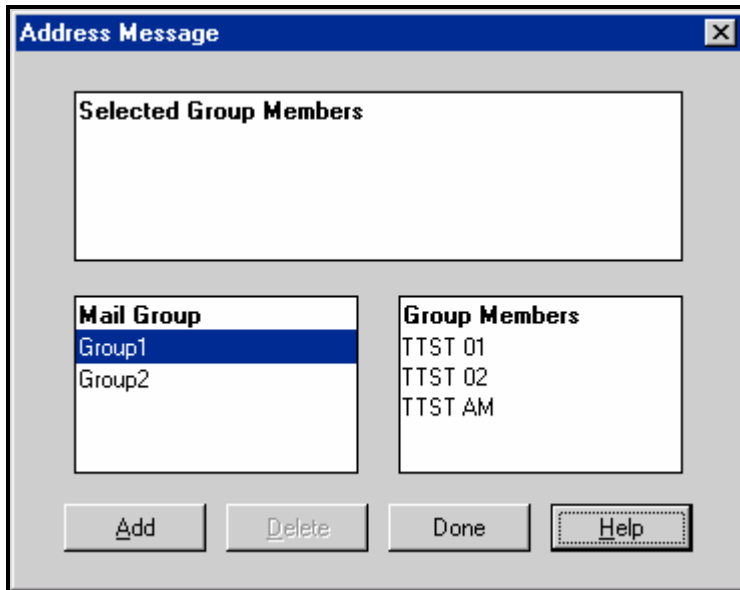


2. For each message recipient, select the resource ID from the **Resources** list, then select the **Add** button. You also can double-click on each desired resource ID. For each resource you select as a recipient of your message, an X will display in that resource ID's check box in the **Resources** list and the resource ID will display in the **Recipients** list.

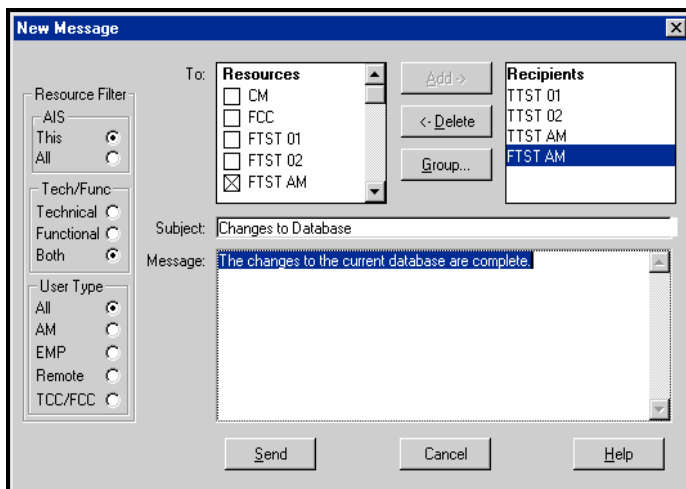
By default, only the resources assigned to the current AIS display in the **Resources** list. You can display all available resources by selecting the **Resource Filter AIS All** radio button. You also can filter by technical and functional resources by selecting the desired **Tech/Func** radio button. To filter by user type, select the desired **User Type** radio button.

3. If you wish to address your message to a mail group, select the **Group** button.

The Address Message window opens.



4. Select the group or groups to whom you wish to send the message from the **Mail Group** list. The members of the selected group(s) display in the **Group Members** list.
5. Select the **Add** button. The group members display in the **Selected Group Members** list.
6. Select the **Done** button. The Address Message window will close.
7. Enter a short description of your message in the **Subject** field.
8. Enter the text of your message in the **Message** field.



9. Select the **Send** button to transmit your message.

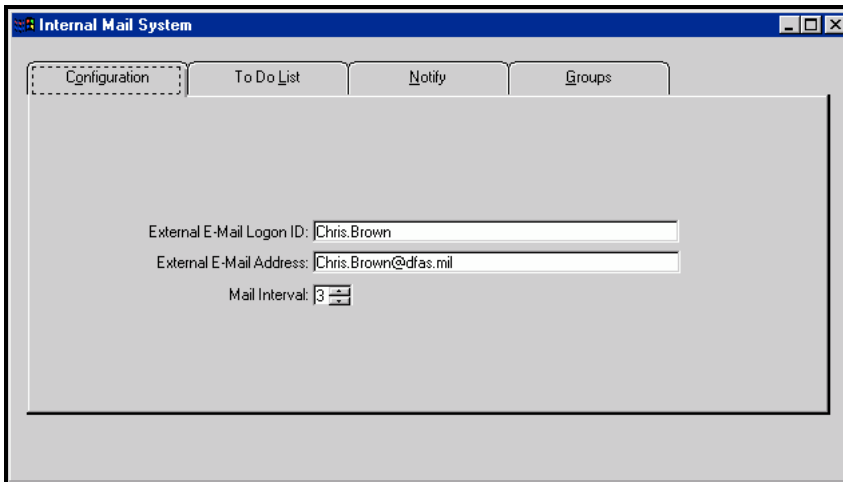
CMIS notifies you that your message has been recorded for delivery.



■ Steps for Configuring CMIS Mail to Interface with an External Mail System

You can configure CMIS mail to interact with an external e-mail application. For most DFAS CMIS users, this mail application is Microsoft Outlook via the Microsoft Exchange Server, although CMIS is designed to work with any MAPI (messaging application program interface) compliant e-mail system. The External Mail System window **Configuration** tab allows you to configure CMIS to interface with an external e-mail system.

1. In the **External E-Mail Logon ID** field enter your external e-mail system logon ID. The value you enter must match your external mail logon ID.

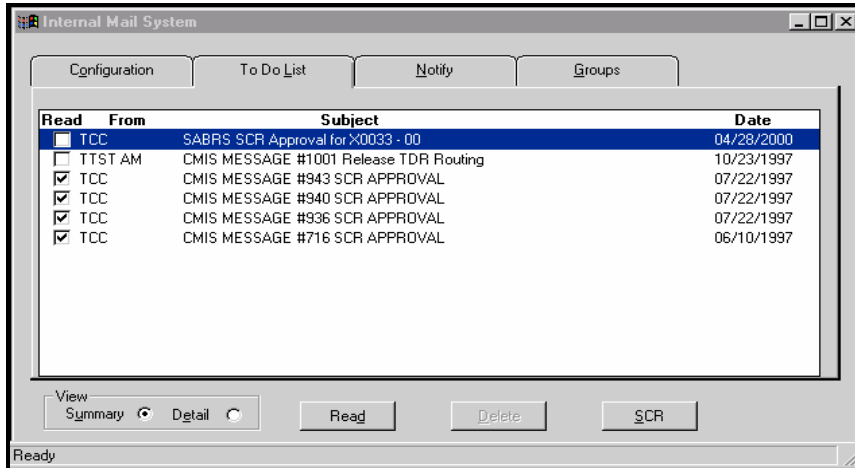


2. Enter your **External E-mail Address** in Internet format. If you use Microsoft Outlook, this value will be your full e-mail address, such as **Chris.Brown@dfas.mil**. If you enter your address in non-internet format, you will receive copies of CMIS mail via the external e-mail system only from other CMIS users who share the same e-mail system. By using the Internet format, you can send/receive messages to/from other e-mail systems.
3. In the **Mail Interval** field, enter the number of minutes to indicate how often CMIS should send your messages and check your mailbox for new messages. If this value is **0** (zero), CMIS will check for new messages only when the user exits from a major process, such as when the user closes the System Change Request window.

■ Steps for Displaying To Do List Messages

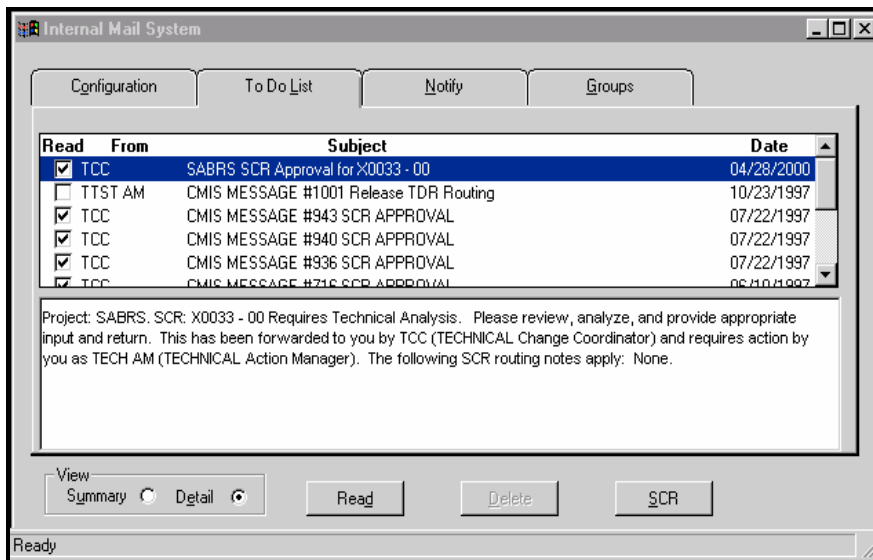
CMIS generates To Do mail messages when users perform specific tasks. For example, if a user forwards a system change request (SCR) to you, CMIS automatically will create and send a message notifying you of the forwarding action. A raised red flag on the toolbar **Mailbox** button indicates you have unread messages.

1. Select the Internal Mail System window **To Do List** tab.



2. Double-click on a message to open it. You also can select the desired message, then select the **Read** button.
3. Select the **Detail** radio button to view messages in preview mode.

When you select the **View Detail** radio button, the message list will display in the upper half of the window and the text of the selected message will display in the lower half. Displaying a message in **Detail** view automatically will generate a check mark in the **Read** check box.



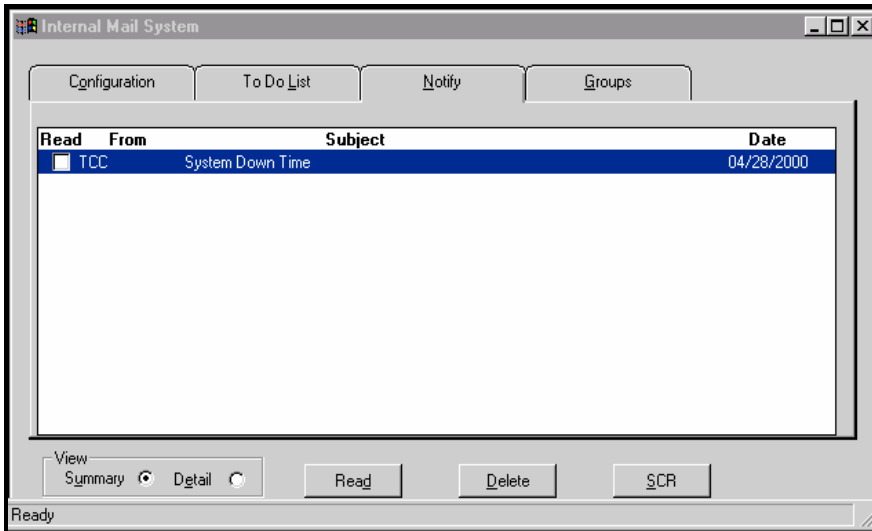
The **To Do List** tab **Delete** button is never enabled because CMIS automatically will delete a To Do message when you perform the action required by the message.

When the To Do message is associated with an SCR for the current AIS, you can open the System Change Request Part Two window by selecting the **SCR** button.

■ Steps for Displaying Notify Messages

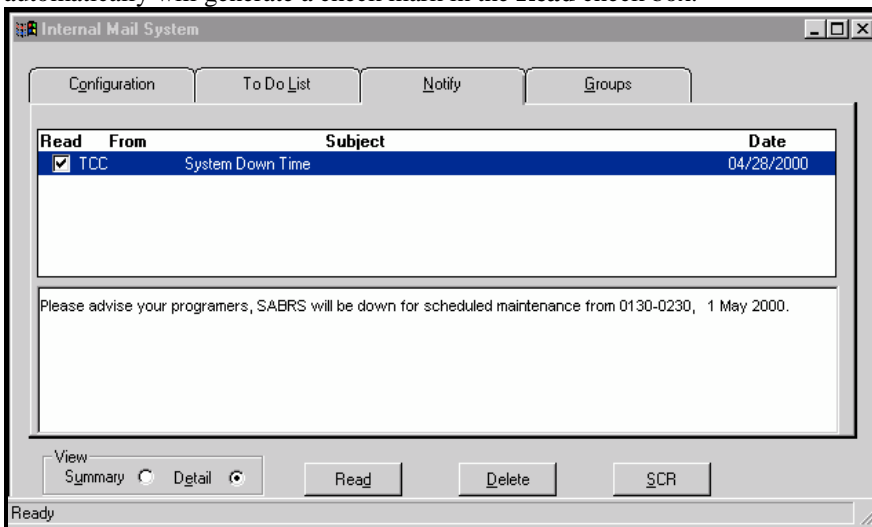
The **Notify** tab contains messages other resources have created and sent to you and CMIS-generated messages which may or may not require action by the recipient. A raised red flag on the toolbar **Mailbox** button indicates you have unread messages.

1. Select the Internal Mail System window **Notify** tab.



2. Double-click on a message to open it. You also can select the desired message, then select the **Read** button.
3. Select the **Detail** radio button to view messages in preview mode.

When you select the **View Detail** radio button, the message list will display in the upper half of the window and the text of the selected message will display in the lower half. Displaying a message in **Detail** view automatically will generate a check mark in the **Read** check box.



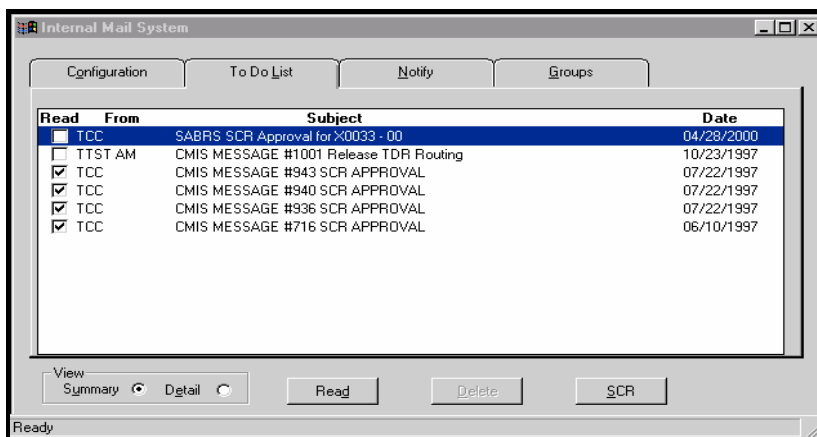
When the message is associated with a specific SCR for the currently selected AIS, you can open the System Change Request Part Two window by selecting the **SCR** button.

Unlike messages on the **To Do List** tab, you can and must delete **Notify** tab messages. To delete a message, select the desired message then select the **Delete** button.

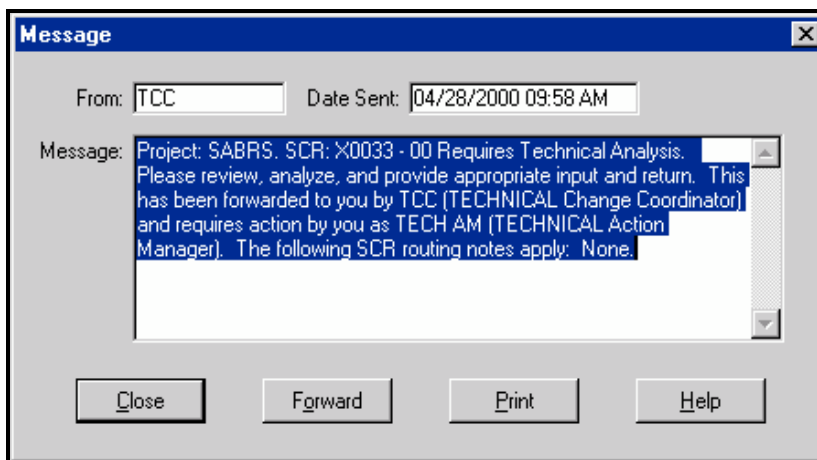
■ Steps for Forwarding a Message

You can forward messages to other resources. The steps for forwarding a message are the same whether you are forwarding a message from the **To Do List** tab or the **Notify** tab. In the following steps a **To Do List** tab message is used as an example.

1. Select the desired message tab: **To Do List** or **Notify**.
2. Select the message you wish to forward.
3. Select the **Read** button. You can also open the message by double-clicking on it.



The Message window opens.

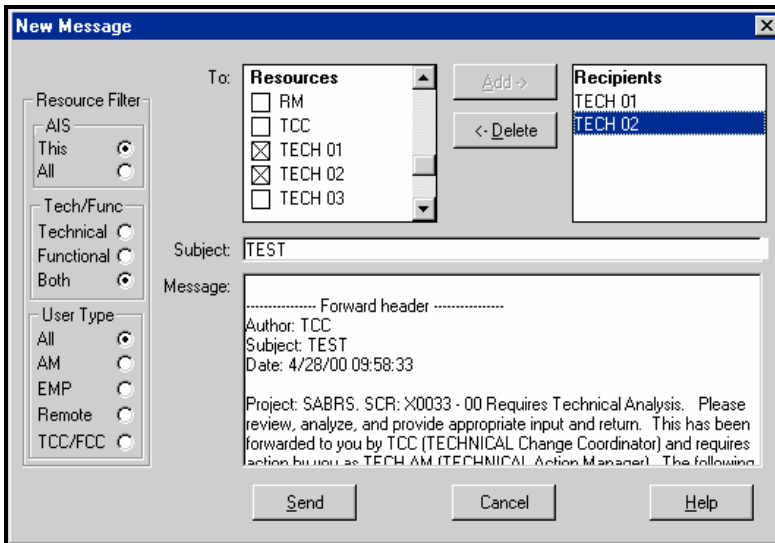


4. Select the **Forward** button.

A CMIS message asks if you want to save the forwarding history for the message.



Select **Yes** if you wish to include forwarding information as part of the forwarded message. Forwarding information includes the previous sender's name, the date the message was sent to you, and the message subject.



- For each message recipient, select the resource ID from the **Resources** list, then select the **Add** button. You also can double-click on each desired resource ID. For each resource you select as a recipient of your forwarded message, an X will display in that resource ID's check box in the **Resources** list and the resource ID will display in the **Recipients** list.

By default, only the resources assigned to the current AIS display in the **Resources** list. You can display all available resources by selecting the **Resource Filter All** radio button. You also can filter by technical and functional resources by selecting the desired **Tech/Func** radio button. To filter by user type, select the desired **User Type** radio button.

- Select the **Send** button.

CMIS notifies you that your message has been recorded for delivery.

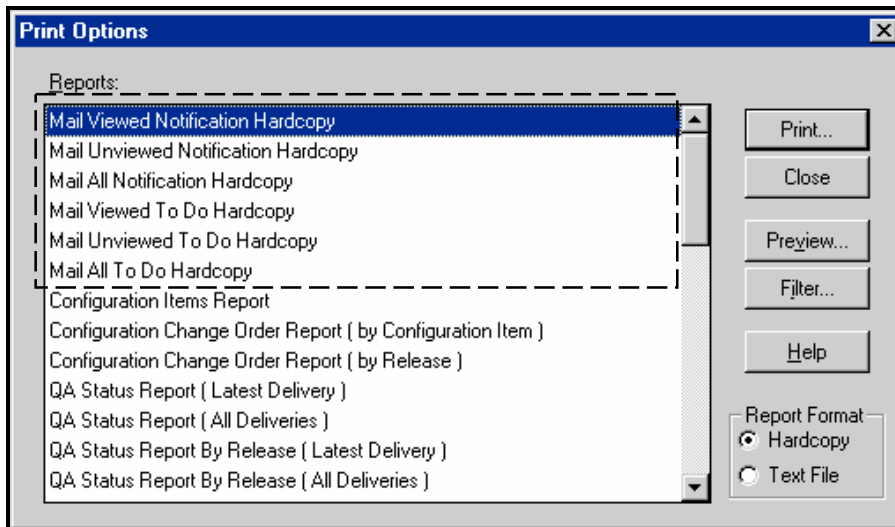
NOTE Forwarding the message is informative only. It does not grant the recipient privileges specified in the message. To grant the recipient the privileges specified in the message, the SCR, system testing level, system testing event or TDR would have to be forwarded to them. That would also generate a message to the recipient.

■ Steps for Printing a Mail Report

If you wish, you can print six different mail reports in CMIS.

1. From the Internal Mail System window select the **Print** toolbar button. You also can select **Print** from the **File** menu.

The Print Options window opens.



When you open the Print Options window from the Internal Mail System window, the **Reports** list defaults to **Mail Viewed Notification Hardcopy**. The **Report Format** defaults to **Hardcopy**.

2. Select the desired report.
3. Select the **Filter** button if you wish to filter the report.
4. Select the **Preview** button to view the report on your monitor or the **Print** button to actually print the report.
5. Enter a short description of the new security class in the **Description** field
6. Select the **Save** button.

The New Security Class window closes, and the new class displays on the Security Classifications window. Now you can enable the desired options for the new security class.

7. Verify the new security class displays on the Security Classifications window.
8. Enable the desired options for the new security class by checking the boxes to the right of each desired option.
9. Select the toolbar **Save** button.

To delete a security class, select the desired security class from the **Class** drop-down list, then select the **Delete** toolbar button.

Chapter 7 - Program Trouble Report Window



Overview

The Program Trouble Report (PTR) window allows users to identify and track automated information system (AIS) discrepancies and problems. When an AIS help desk receives a call from a user, a PTR often results. Reported problems range from user misunderstandings to hardware and software difficulties.

The Program Trouble Report window contains the following tabs:

Configuration Tab

Contains basic information about the selected PTR.

Customer Tab

Contains information regarding the customer reporting the problem.

Referral Tab

Allows an authorized user to refer a PTR to another user for action.

Outcome Tab

Contains information concerning the resolution of the PTR.

SCR's Tab

Allows users to cross-reference a PTR with a system change request (SCR) or create an SCR from a PTR.

PTR X-Ref Tab

Allows users to establish and remove relationships between PTR's of different AIS's.

Restrictions

- Access to Program Trouble Report window processes depends on the user's security classification and user type.

***R* Program Trouble Report Options**

Create a PTR

Add a PTR Relationship

Create an SCR from a PTR

Close a PTR

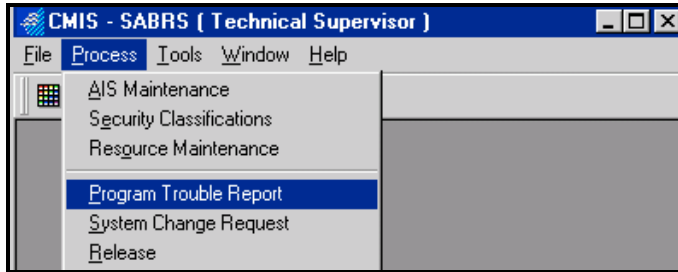
Duplicate a PTR

Refer a PTR

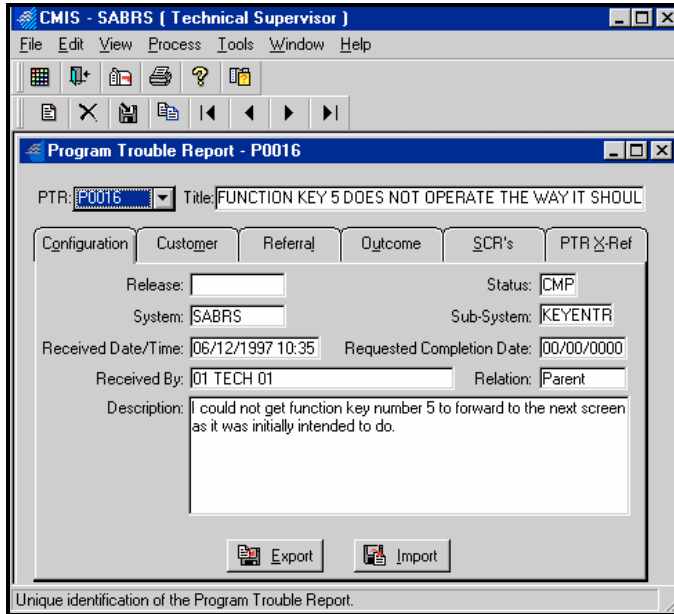
Print PTR Reports

Delete a PTR

Open the Program Trouble Report window by selecting **Program Trouble Report** from the **Process** menu.



The Program Trouble Report window opens.



Steps for Creating a Program Trouble Report

To create a new PTR, you must enter a title along with required configuration and customer information. CMIS will establish default configuration information for some fields; you can modify most default information.

1. From the Program Trouble Report window, select the **New** toolbar button.

The New Program Trouble Report window opens.

2. Enter a brief description of the new PTR in the required **Title** field.

CMIS provides several default values on the New PTR window. The **Status** field defaults to **PND** (pending), and is display-only on the New Program Trouble Report window. The **System** field defaults to the current AIS. The **Received Date/Time** field defaults to the current system date and time. The **Received By** field defaults to the current user's ID.

3. In the required **Release** field, enter the production release number of the application in which the user encountered a problem.
4. In the required **Sub-System** field, enter the specific area of the AIS the PTR affects.
5. In the **Requested Completion Date** field, enter the completion date requested by the customer for resolution of the problem.
6. In the **Relation** field, indicate whether the PTR is a parent, child, or has no relationship to other PTR's. You can establish and view PTR relationships on the Program Trouble Report window **PTR X-Ref** tab.
7. Enter the detailed description of the reported problem in the required **Description** field.
8. If you wish to copy the **Description** field text to an external text file that can be retrieved in another application or in another CMIS window, select the **Export** button.
9. If you wish to retrieve a text file into the **Description** field, select the **Import** button.
10. Select the **Customer** tab.

11. Enter the problem type code in the **Problem Type** field. Problem type codes are user-defined and unique to each AIS.
12. Enter a one-character code identifying the relative importance of resolving the reported problem in the **Priority** field. The values used to prioritize PTR's are user-defined and unique to each AIS.
13. Enter the customer point of contact (POC) name in the required **POC Name** field.
14. Enter the organization code of the reporting organization in the required **POC Org Cd** field.

When adding a new PTR, you must include either a DSN (Defense Switching Network) or commercial phone number for the customer POC.

15. Enter the DSN phone number in the **DSN Phone** field or the commercial phone number in the **Commercial Phone** field.
16. Enter the code furnished by the user to identify and track this PTR within that user's organization in the **Customer Control Num** field.
17. Enter the Unit Identification Code (UIC) in the required **UIC** field.
18. Enter the activity code of the reporting activity in the required **Reporting Activity** field.
19. Select the **Save** button.

After you select **Save**, the New PTR window will close. The PTR you just added will display on the Program Trouble Report window with the PTR number assigned automatically by CMIS.

■ Steps for Adding a PTR Relationship

Authorized users can establish relationships or dependencies between PTR's of different AIS's. When you establish a relationship between two PTR's, one PTR will be the "parent" and the other will be the "child." The parent PTR cannot be completed until all its children are completed. A PTR that is a parent in one relationship can only be the parent in other relationships. A PTR that is a child in one relationship can only be the child in other relationships.

10. On the Program Trouble Report window, select the **PTR X-Ref** tab.

AIS	PTR	Relationship	Status
TFS	P0003	Child	PND

11. Select the **Add** button.

The Add PTR Relationship window opens.

PTR	Title
P0002	GENERAL LEDGER FILE DESCRIPTION NEEDS CH
P0003	TIME OUT ON PC0090

Relationship: Child

12. Select the desired AIS from the drop-down list.

13. Select the desired PTR from the displayed list.

14. Select **Parent** or **Child** from the **Relationship** drop-down list.

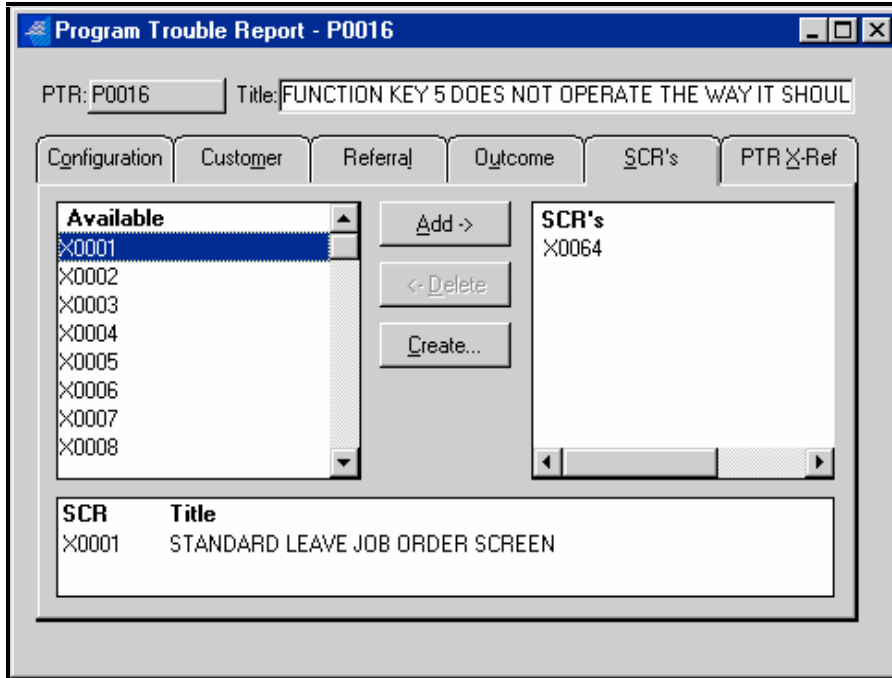
15. Select the **Save** button.

If you wish to delete a PTR relationship, on the **PTR X-Ref** tab select the PTR you wish to delete and select the **Delete** button.

■ Steps for Creating an SCR from a PTR

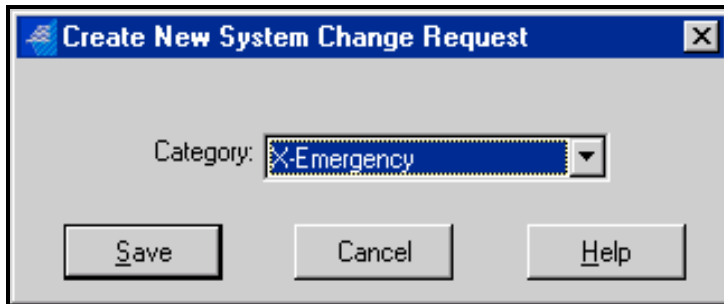
CMIS users with the appropriate security classification can create a new SCR from an existing PTR.

1. On the Program Trouble Report window, select the **SCR's** tab.



2. Select the desired PTR from the **PTR** drop-down list.
3. Select the **Create** button.

The Create New System Change Request window opens.



F
i
g

4. Select the desired SCR category from the **Category** drop-down list.
5. Select **Save**.

After you select **Save**, the newly created SCR is assigned the next sequential SCR number and displays on the **SCR's** tab **SCR's** list.

■ Steps for Closing a PTR

The **Outcome** tab contains information concerning the resolution of the PTR. When you wish to close a PTR you must enter **Outcome** tab data. If the selected PTR has a child or children, you cannot close the PTR until all the child PTR's have been closed.

1. On the Program Trouble Report window, select the **Outcome** tab.

2. Select the desired PTR from the **PTR** drop-down list.
3. Enter the number of labor hours used to process the PTR in the **Staff Hours** field.
4. Enter the date the PTR was closed or completed in the **Completion Date** field.
5. Enter the number of program files affected by the PTR in the **Programs** field.
6. Enter the number of executive control language (ECL) or job control language (JCL) processes affected by the PTR in the **ECL/JCL** field.
7. Enter a description of the investigative results of the PTR evaluation in the **Action** field.
8. If you wish to copy the **Action** field text to an external text file, select the **Export** button.
9. If you wish to retrieve a text file into the **Action** field, select the **Import** button.
10. Select the toolbar **Save** button.

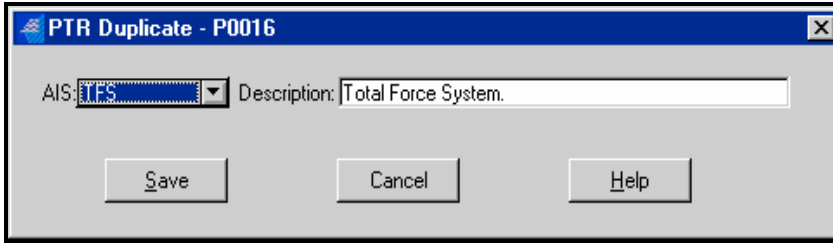
After you select **Save**, the **Configuration** tab **Status** field will update to **CMP** (complete).

■ Steps for Duplicating a PTR

You can duplicate an existing parent PTR in one or more AIS's. You cannot duplicate child PTR's. When you duplicate a PTR, CMIS will copy data from the existing PTR to the duplicated PTR and provide default values where applicable. The duplicated PTR will not necessarily have the same number as the original.

1. From the **PTR** drop-down list, select the PTR you wish to duplicate, then select **Duplicate** from the **File** menu.

The PTR Duplicate window opens.



2. Select the AIS you wish to copy the PTR to from the **AIS** drop-down list.
3. Select the **Save** button.

CMIS will display a message indicating the PTR has been replicated in the AIS you selected.

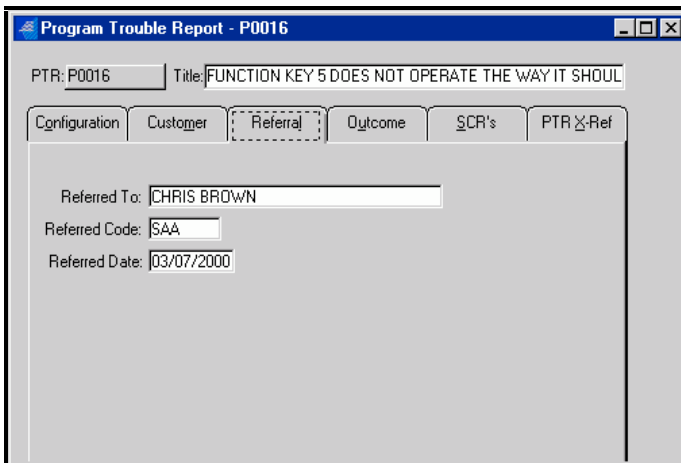


4. Select the **OK** button.

■ Steps for Referring a PTR

From the Program Trouble Report window **Referral** tab, you can refer a PTR to any user.

1. On the Program Trouble Report window, select the **Referral** tab.



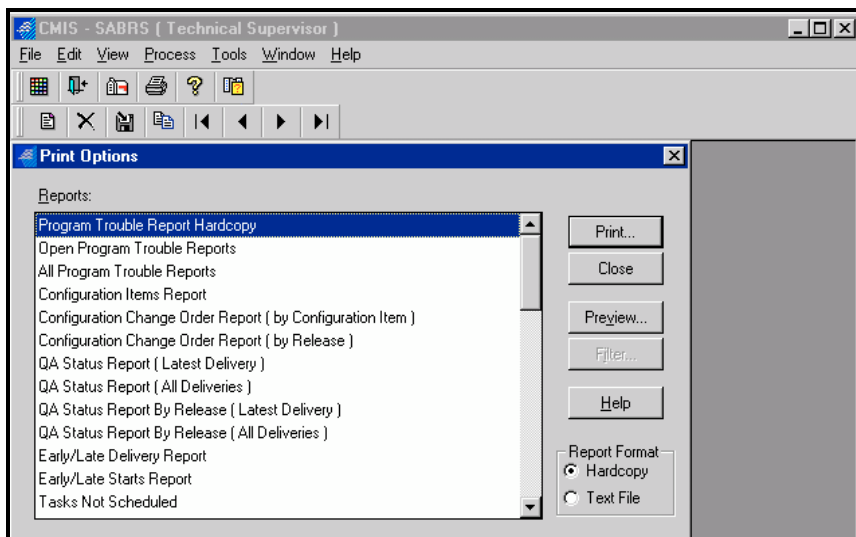
2. Select the desired PTR from the **PTR** drop-down list.
3. Enter the name of the user to whom you are referring the PTR in the required **Referred To** field.
4. Enter the organizational code of the user to whom you are referring the PTR in the required **Referred Code** field.
5. Enter the PTR referral date in the required **Referred Date** field.
6. Select the toolbar **Save** button.

■ Steps for Printing PTR Reports

You can use the Print Options window to print PTR reports. When you open the Print Options window from the Program Trouble Report window, three PTR items will be available: **Program Trouble Report Hardcopy**, **Open Program Trouble Reports**, and **All Program Trouble Reports**. Access to Print Options depends on your security classification.

1. From the Program Trouble Report window, select the **Print** toolbar button or select the **File** menu **Print** item.

The Print Options window will open.



When you open the Print Options window from the Program Trouble Report window, the **Reports** list defaults to **Program Trouble Report Hardcopy**.

2. Select the desired report from the **Reports** list.
3. Select the **Print** button or select the **Preview** button to view the report on the screen.

■ Steps for Deleting a PTR

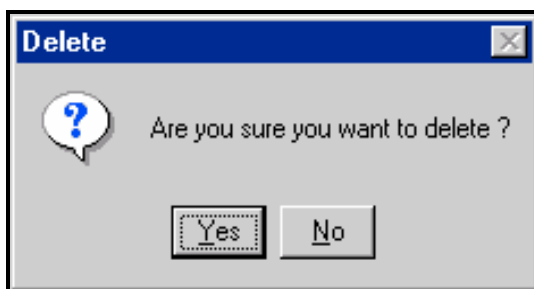
1. Select the PTR you wish to delete from the **PTR** drop-down list.
2. Select the **Delete** toolbar button.

The screenshot shows a software window titled "CMIS - SABRS (Technical Supervisor)". Inside, there is a sub-window titled "Program Trouble Report - P0016". The sub-window has a menu bar (File, Edit, View, Process, Tools, Window, Help) and a toolbar. Below the toolbar, there is a form with the following fields:

- PTR: P0016 (dropdown menu)
- Title: FUNCTION KEY 5 DOES NOT OPERATE THE WAY IT SHOUL (text field)
- Configuration (tab)
- Customer (tab)
- Referral (tab)
- Outcome (tab)
- SCR's (tab)
- PTR X-Ref (tab)
- Release: (text field)
- Status: CMP (text field)
- System: SABRS (text field)
- Sub-System: KEYENTR (text field)
- Received Date/Time: 06/12/1997 10:35 (text field)
- Requested Completion Date: 00/00/0000 (text field)
- Received By: 01 TECH 01 (text field)
- Relation: Parent (text field)
- Description: I could not get function key number 5 to forward to the next screen as it was initially intended to do. (text area)
- Export (button)
- Import (button)

At the bottom of the sub-window, there is a status bar that reads "Unique identification of the Program Trouble Report."

A message will ask you to confirm the deletion.



3. Select **Yes** to confirm the deletion.

Chapter 8 - Configuration Item Types Window



Overview

This chapter discusses creating, modifying, and deleting configuration item (CI) types as well as importing and printing CI types. A CI type identifies a general category of CI's.

Restrictions

- CMIS users must have the Security Classifications window **System Tables - Maintain Configuration Items** option enabled to configure CI types.
- Only the CMIS Administrator can import CI types into CMIS.

R Configuration Item Types Window Options

Create a New CI Type

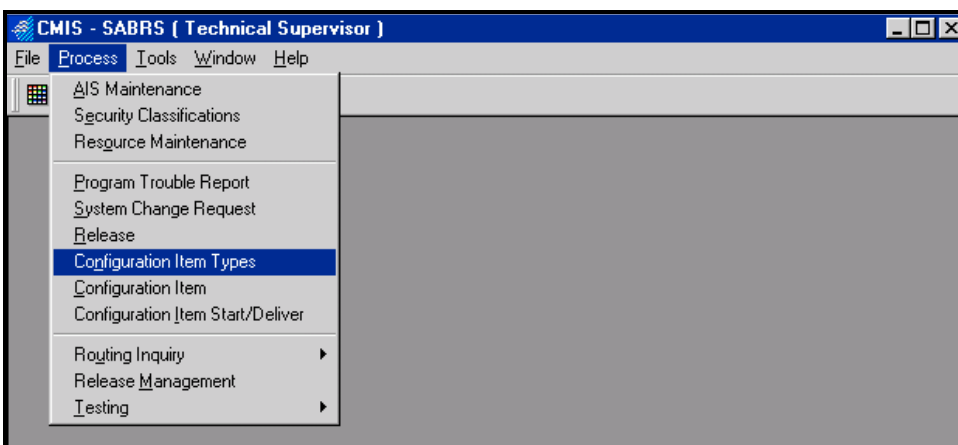
Modify a CI Type Description

Delete a CI Type

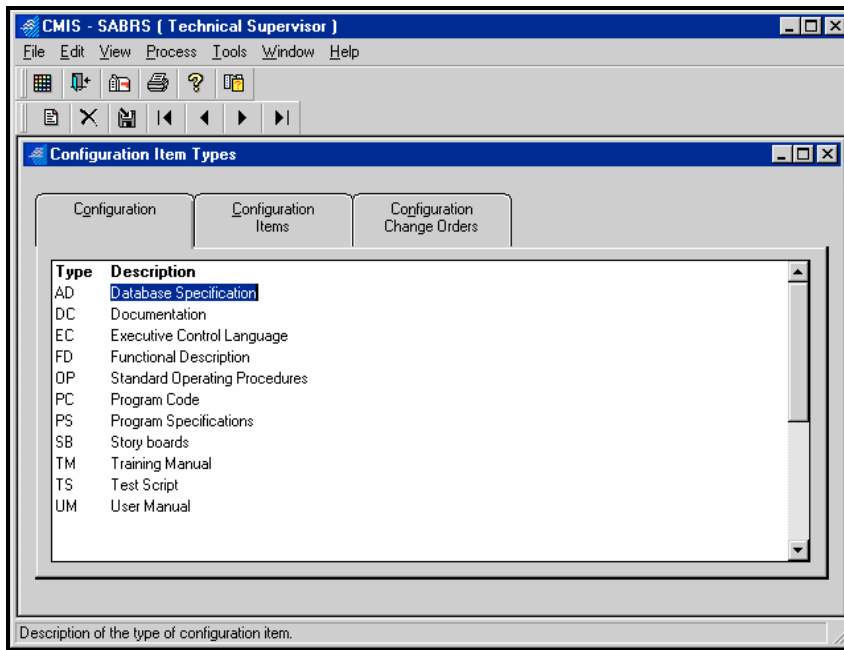
Import CI Types

Print CI Types

Open the Configuration Item Types window by selecting **Configuration Item Types** from the **Process** menu.



The Configuration Item Types window will open.

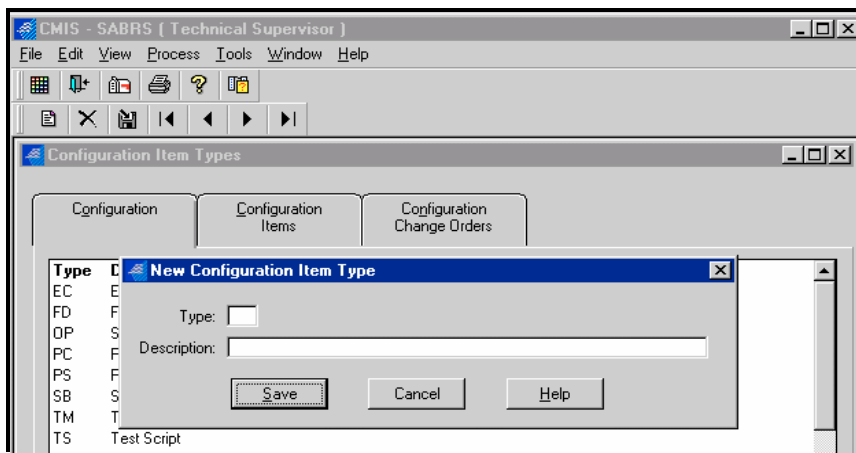


■ Steps for Creating a New CI Type

If you attempt to create a new CI type with the same name as an existing CI type, a message will advise you the CI type already exists and no further action is required. If you attempt to create a CI type with the same name as a previously deleted CI type, CMIS will ask if you wish to undelete the CI type. If you select **Yes**, CMIS will restore the CI type. If you select **No**, the undelete action will abort and the New CI Type window will close.

1. From the Configuration Item Types window, select the **New** toolbar button or select the **File** menu **New** item.

The New Configuration Item Type window opens.



2. Enter the two-letter configuration item type code in the **Type** field.

Although a CI type can be a single character, it is always best to use two characters. They also should be descriptive of their category. For example, use **PR** for *program* or **EC** for *executive control language*. Advanced planning is the key to creating meaningful CI type codes.

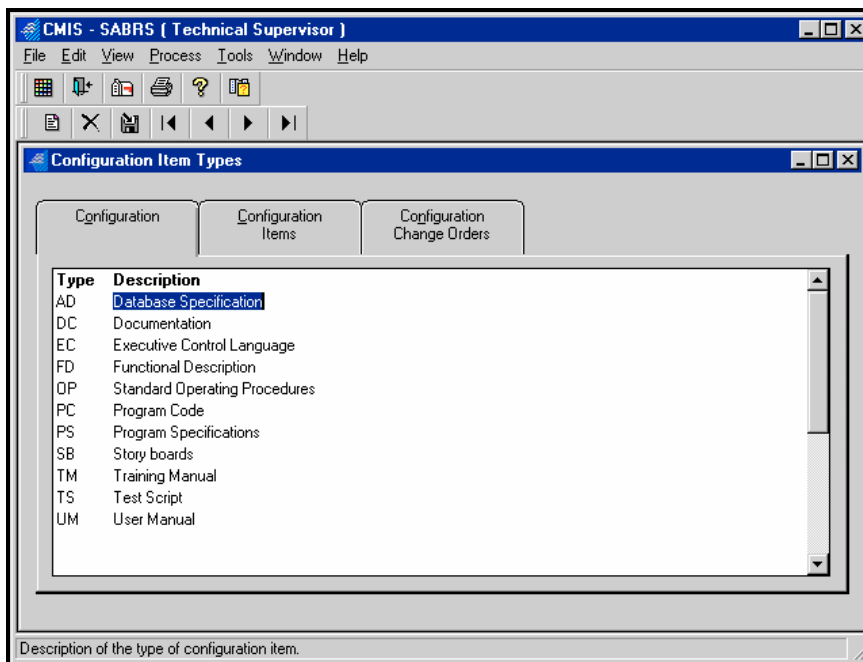
3. Enter a brief description of the new CI type in the **Description** field
Select the **Save** button

The new CI type window closes and the new CI type displays in the list of CI types.

■ Steps for Modifying a CI Type Description

You can modify CI type descriptions but you cannot modify CI type codes. If you need to modify the CI type code, you must delete the CI type and create a new one using the desired CI type code.

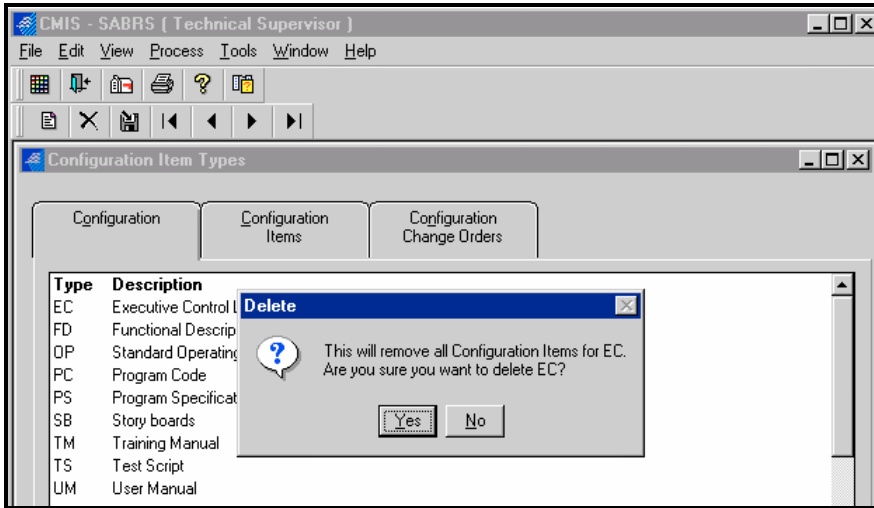
1. On the Configuration Item Types window, select the CI type description you wish to modify.
2. Make the desired changes to the CI type description.
3. Select the toolbar **Save** button to save the CI type description changes.



■ Steps for Deleting a CI Type

You can delete a CI type if all CI's associated with the CI type are eligible for deletion. If the CI type is associated with a configuration change order (CCO) for a system change request (SCR) that does not have a pending or canceled status, you cannot delete the CI type. If you try to delete a CI type that is not eligible for deletion, you will receive the following message: "You are attempting to delete a Configuration Item Type that has Configuration Item(s) that are not on a Certified Release." For a CI type to be eligible for deletion, all associated CI's must be removed from non-certified releases.

1. On the Configuration Item Types window, select the CI type you wish to delete.
2. Select the **Delete** toolbar button or select the **File** menu **Delete** item.
3. Select **Yes** on the message asking you to confirm the deletion.



The deleted CI type and description will no longer display in the CI types list.

NOTE You can restore a deleted CI type by creating it as a new CI type.

■ Steps for Importing CI Types

You can import CI types into CMIS from another configuration management tool. You also can import a list of standard CI types from a file that accompanies the CMIS application.

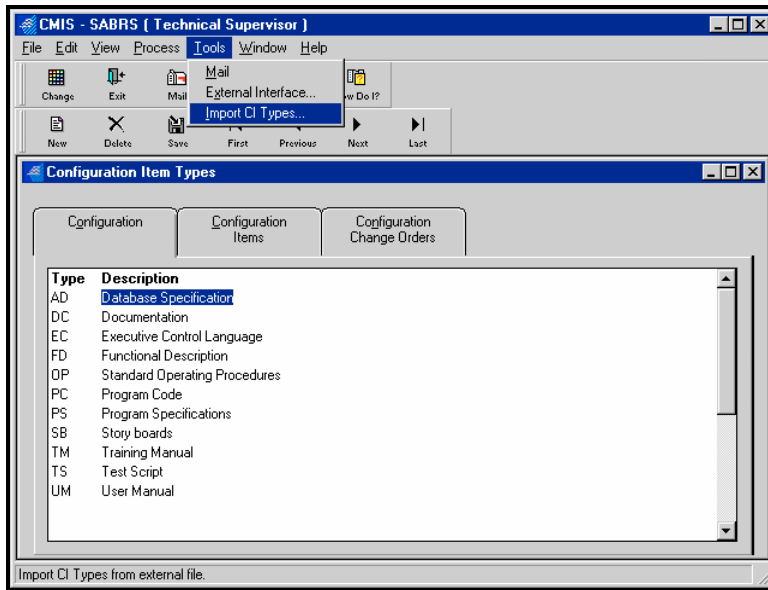
The imported file must contain the required data in the appropriate format and order. To import a CI types file, the file must contain the following required data elements in the order shown:

- CI Type
- CI Type Description

You can import CI types in four different file formats: tab delimited text, comma delimited text, fixed length text, and dBase (*.DBF) files. The tab delimited text file must contain the required data separated by tabs. The comma delimited text file must contain the required data separated by commas.

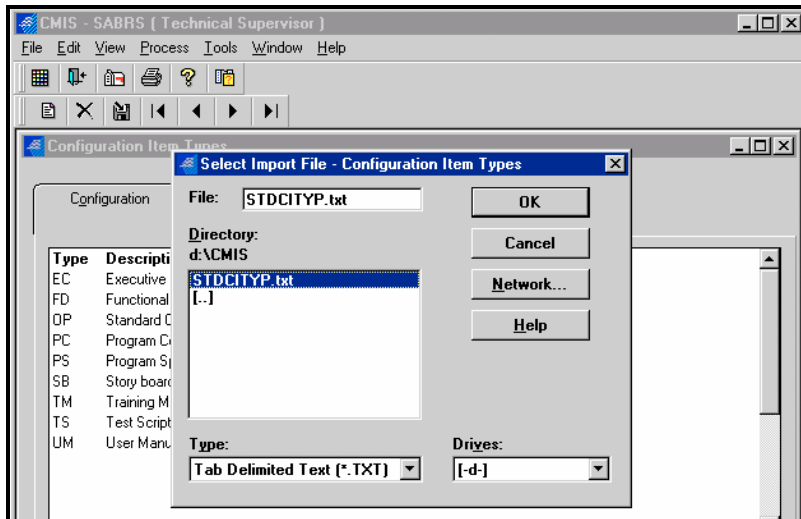
NOTE CMIS includes a tab delimited text file named STDCITYP.TXT. This file is co-located with the CMIS application. This file contains a list of standard CI types that you can import. You can tailor the list by adding or deleting CI types to satisfy your specific requirements.

1. From the Configuration Item Types window, select **Import CI Types** from the **Tools** menu.

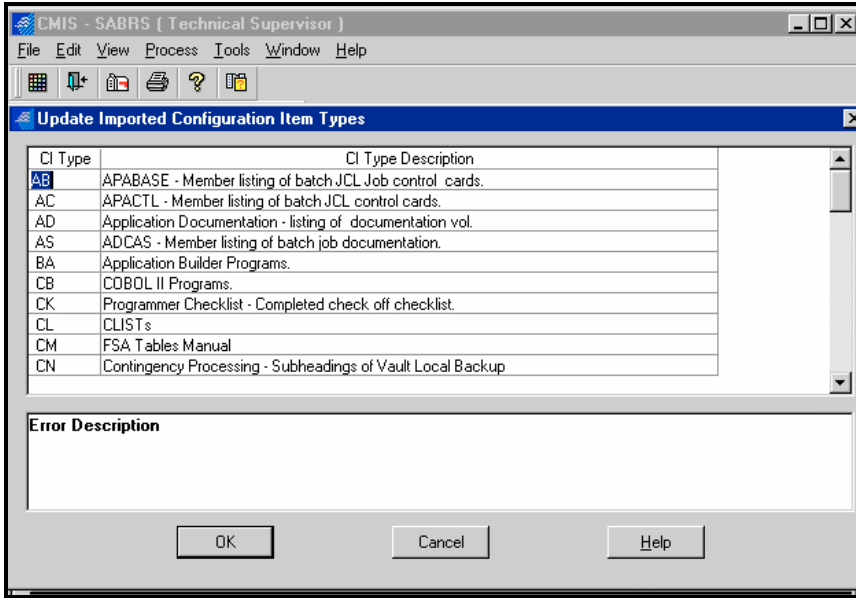


The Select Import File window will open.

2. Select the file you wish to import, then select the **OK** button.

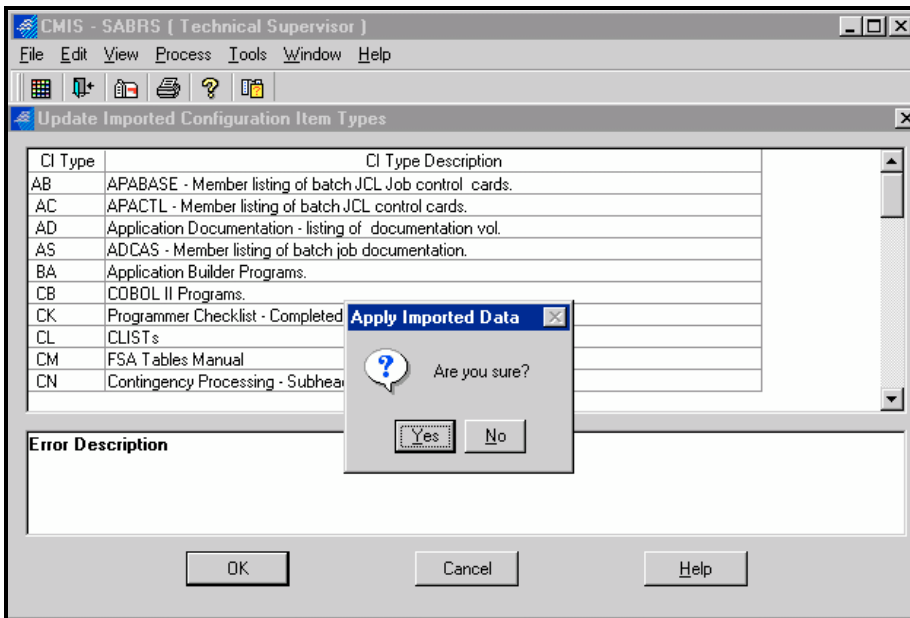


The Update Imported Configuration Item Types window opens.

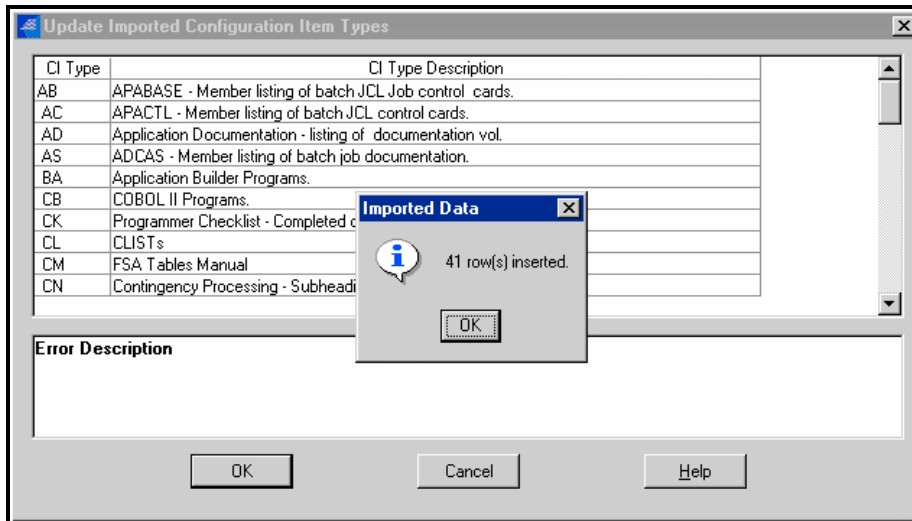


You can modify CI types and descriptions on the Update Imported Configuration Item Types window. You cannot add or delete CI types or descriptions on this window

3. Make any desired changes to the CI types and descriptions.
4. Select the **OK** button.
5. A message will ask you to confirm the import. Select **Yes** to complete the import action.

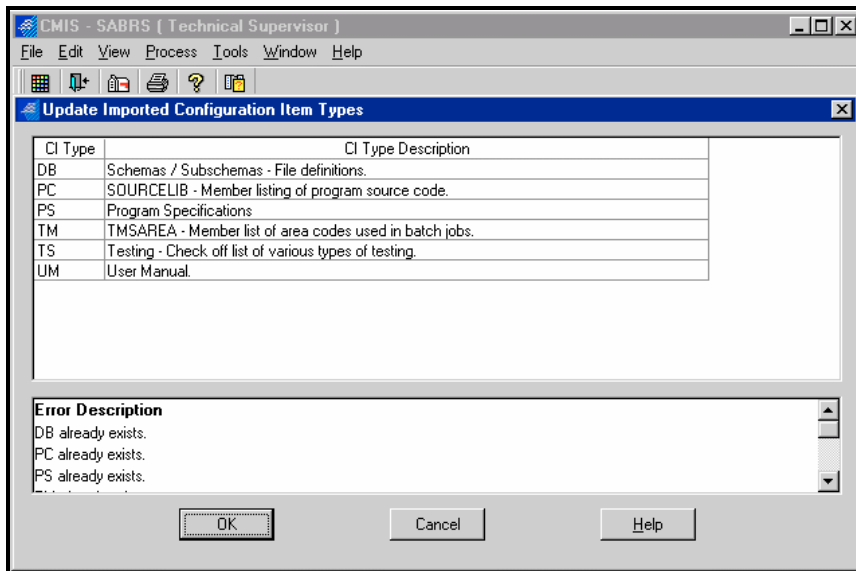


A message reports the number of rows successfully imported.

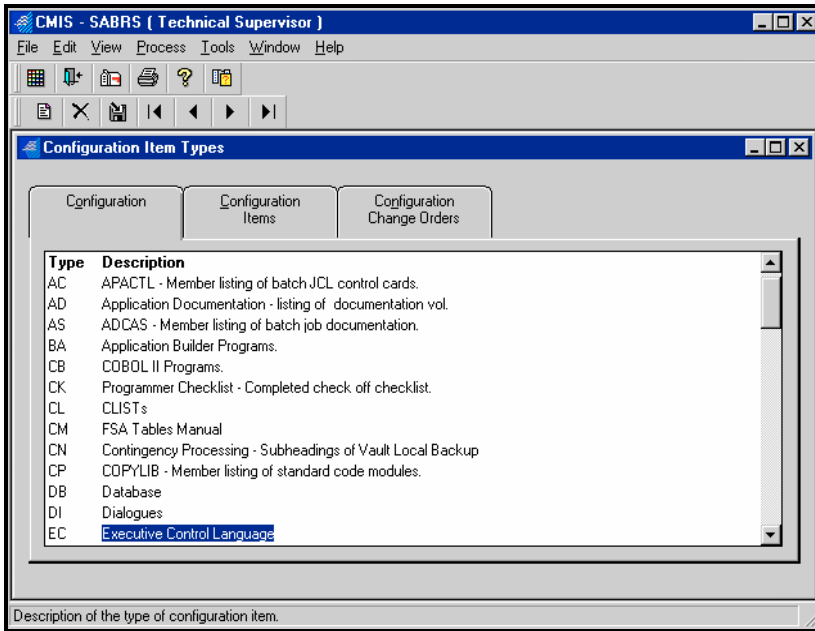


After you import CI types, CMIS will generate a list of any CI types that were not imported along with error descriptions. You can modify the CI types on the error list to resolve the errors or cancel the action and accept only the CI types that successfully imported. If you modify the error list, select **OK** to save your changes.

CMIS will generate a new error list each time you modify the error list and select **OK** until all errors are resolved or you select **OK** without making any additional changes.



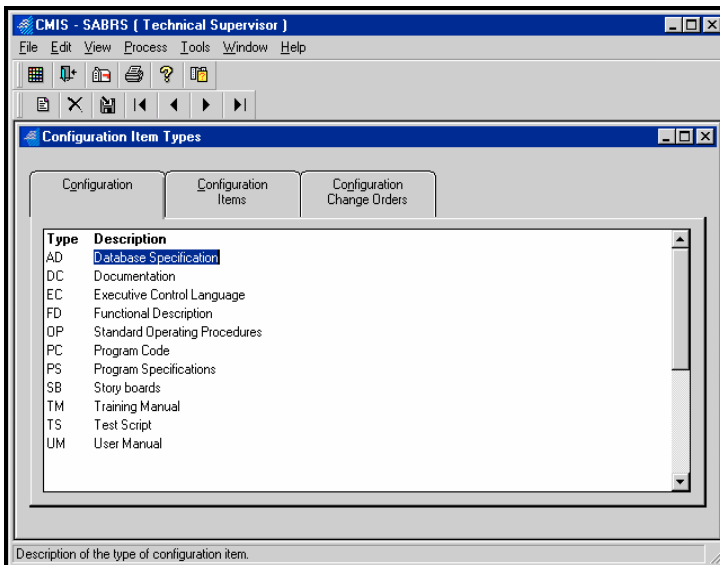
The Configuration Item Types window will display the imported data. You can edit this data to meet your specific requirements.



Steps for Printing CI Types

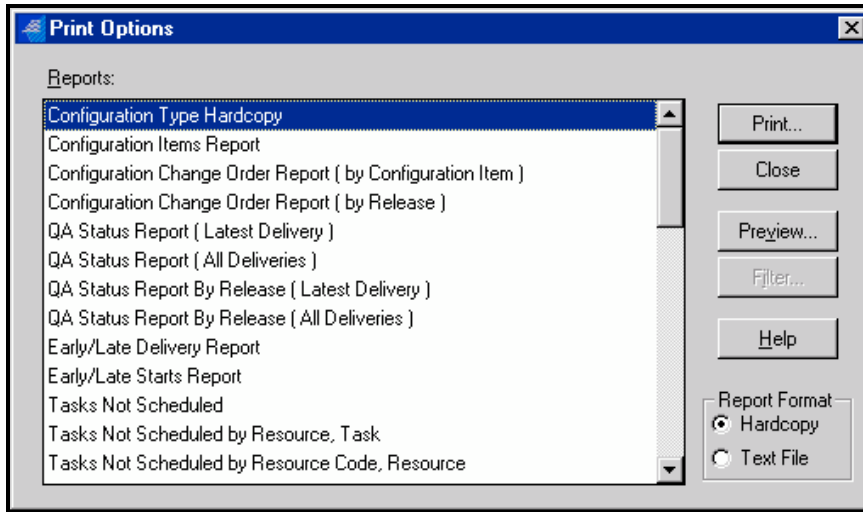
You can use the Print Options window to print the Configuration Hardcopy Report. This report is only available in hardcopy format. Access to Print Options depends on your security classification.

1. From the Configuration Item Types window, select the **Print** toolbar button or select the **File** menu **Print** item.



When you open the Print Options window from the Configuration Item Types window, the report list defaults to **Configuration Type Hardcopy**.

2. To print the **Configuration Type Hardcopy** Report select the **Print** button or select the **Preview** button to view the report on the screen. The **Report Format** defaults to **Hardcopy**.



Chapter 9 - Configuration Item Window



Overview

A configuration item (CI) is a configuration component that will be controlled. This chapter provides information on working with CI's, specifically, the options available from the Configuration Item window.

The Configuration Item window has four tabs: **Configuration**, **Configuration Item Details**, **Quality Assurance**, and **Configuration Change Orders**. From the **Configuration** tab you can select an existing CI, create a new CI, or delete a CI. The **Configuration Item Details** tab allows you to define parameters for the new CI. Use the **Quality Assurance** (QA) tab to add QA information for the CI. From the **Configuration Change Orders** (CCO's) tab, you can view CCO's associated with the CI.

Restrictions

Only CMIS users with the Security Classifications window **System Tables – Maintain Configuration Items** option enabled can maintain CI's.

- Only the CMIS Administrator can import CI's into CMIS.

Configuration Item Window User Options

Create a New CI

Modify CI Details

Delete a CI

Undelete a CI

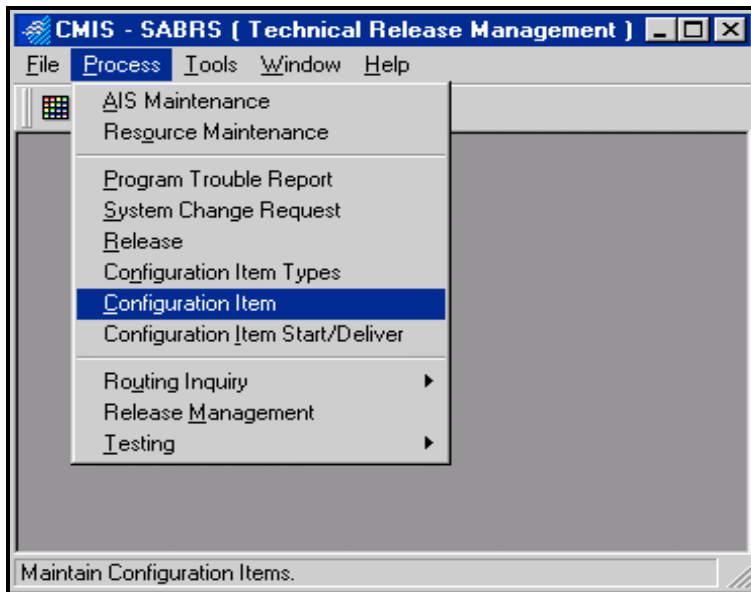
Add CI Quality Assurance Information

Import CI's and Make Mass Changes to CI's

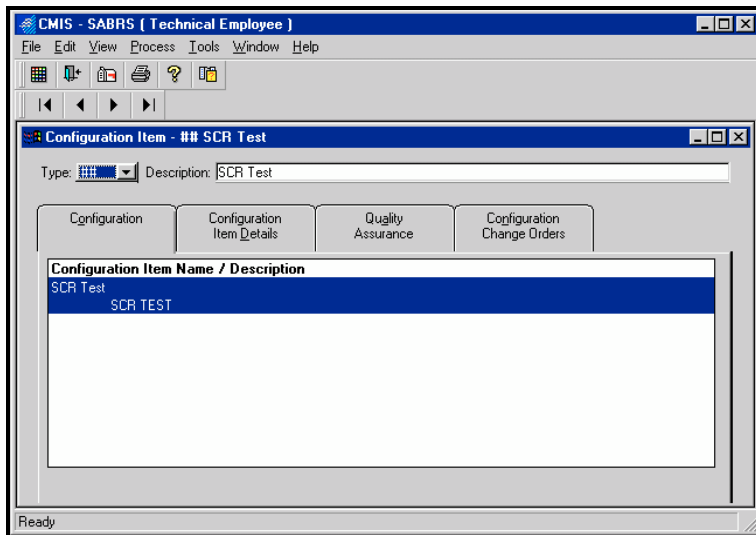
View CI CCO's

Print the Configuration Items Report

To open the Configuration Item window, select **Configuration Item** from the **Process** menu.



The Configuration Item window opens.



■ Steps for Creating a New CI

To create a new CI, simply identify the CI type and give it a name. Typically, however, you will add configuration details and quality assurance data when you create a new CI.

1. From the Configuration Item window, select the **New** toolbar button or select **New** from the **File** menu.

The New Configuration Item window opens.

2. From the **Type** drop-down list select the two-letter CI type code and description for the new CI.
3. In the required **Name** field enter the name of the new CI.

Tip It is a common practice to name CI's by assigning them a number.

4. In the **Description** field enter a brief description of the CI.
5. In the **Responsibility Code** field enter the code of the organization responsible for the new CI.

Usually, Release Management personnel define the values for the **Release Destination** and **Release Location** fields.

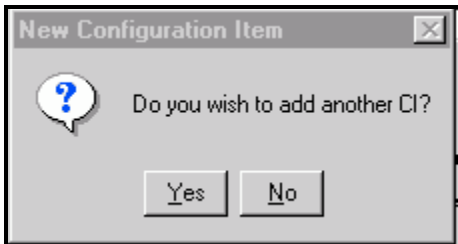
6. In the **Release Destination** field enter the CI release destination code of up to three characters. If this field contains a value, then the CI is a releasable item. If this field is blank or contains **N/A**, the CI is a non-releasable item.
7. Enter the four-character code provided by Release Management to indicate the **Release Location** of the new CI. Often, this value indicates the type of computer system on which the new CI will reside.
8. If the new CI is a document or a manual, enter the document number of up to four characters in the **Document ID** field.
9. From the **Unique Release Mgr** drop-down list, select the user ID of the Release Manager controlling the CI.
10. If work will begin on the new CI before the system change request (SCR) is locked, check the **Modify on an Unlocked SCR** check box.
11. If the new CI is a deliverable, check the **Deliverable** check box, indicating the CI requires Release Management processing.
12. If you want CMIS to generate a notification to Release Management when a CCO associated with the new CI has started, check the **Generate task Start message to Release Mgr** check box.
13. If you want CMIS to generate a notification to Release Management when a CCO

associated with the new CI has been delivered, check the **Generate task Delivery Msg. to Release Manager** check box.

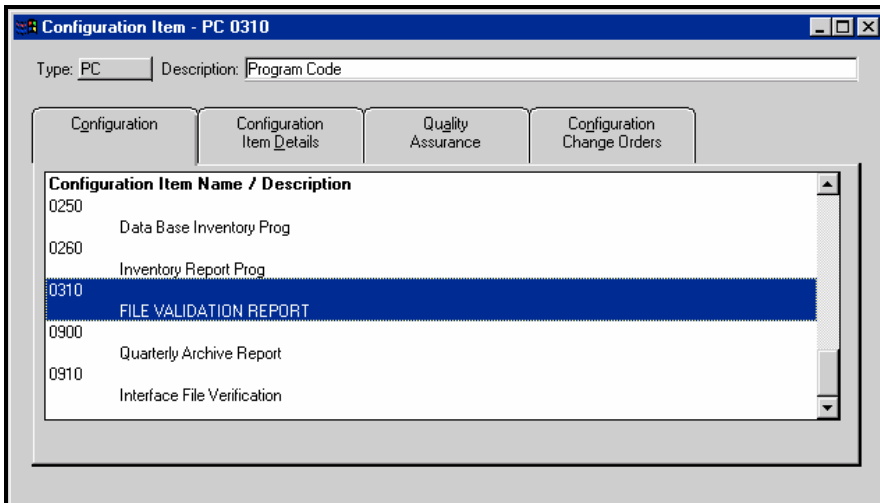
14. If desired, you can select from the **First Release/Recorded** drop-down list the release number of the first release in which the CI is intended for use or actually was used. The **First Release/Recorded** date defaults to current date.
15. If desired, you can select from the **Final Release/Recorded** drop-down list the release number for the last release in which the CI is intended for use or actually was used. The **Final Release/Recorded** date defaults to the current date.

The **CI Added** date will default to the current date when you save the new CI.

16. Select the **Save** button. CMIS will ask if you wish to add another CI.



If you select the **Yes** button, the New Configuration Item window will redisplay, allowing you to replace the previously added CI data with data for another new CI. If you select the **No** button, the New Configuration Item window will close, and the Configuration Item window will display the CI you just added.



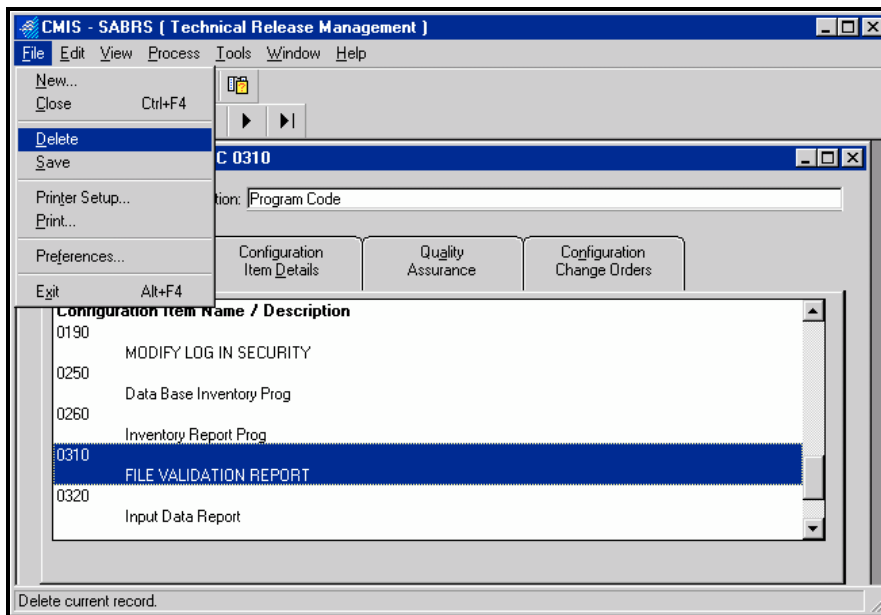
■ Steps for Modifying CI Details

1. On the Configuration Item window **Configuration** tab.
2. Select the CI you wish to modify.
3. Select the **Configuration Item Details** tab.
4. Modify the desired data.
5. Select the toolbar **Save** button to save your changes.

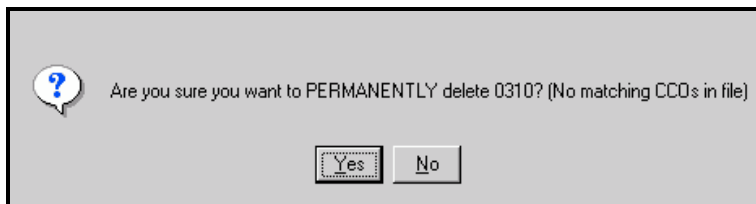
■ Steps for Deleting a Configuration Item

There are two types of CI deletions: “hard” delete and “soft” delete. The hard deletion permanently deletes the CI, and is available only for CI's that do not have existing CCO's. The soft deletion removes the CI from the Configuration Item window display but CMIS retains the CI name and related data. If a CI has existing CCO's, you can only soft-delete it.

1. From the Configuration Item window **Configuration** tab, select the CI you wish to delete.
2. Select the toolbar **Delete** button. You also can select **Delete** from the **File** menu.



If the selected CI does not have existing CCO's assigned, CMIS prompts you to confirm the action to permanently delete the CI.



3. Select the **Yes** button to permanently delete the CI.

If you select **No**, a CMIS message asks you to confirm the soft deletion.



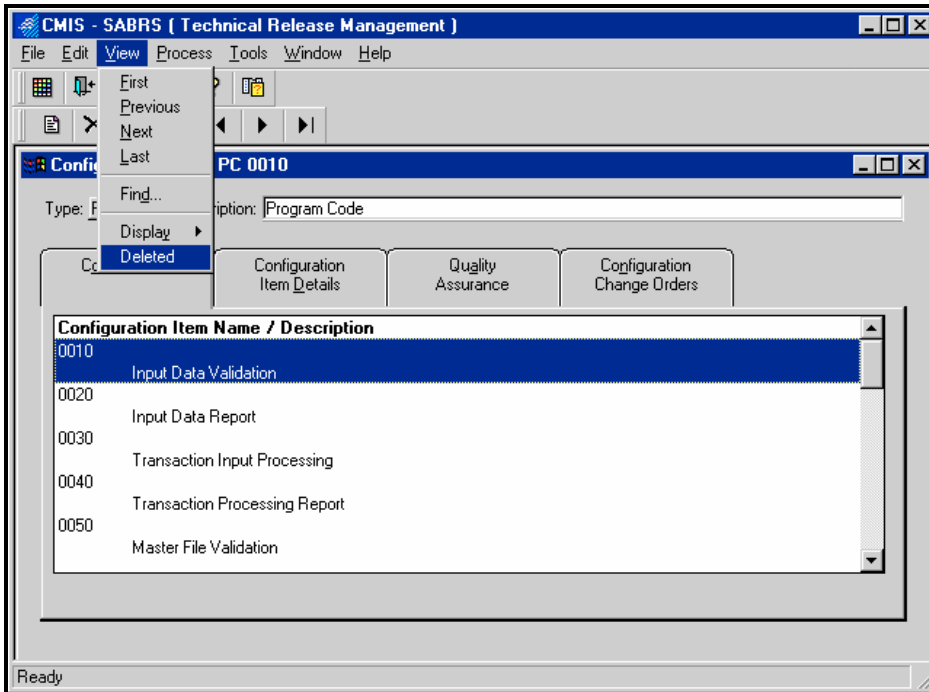
F
i

4. Select the **Yes** button to soft-delete the CI or **No** to end the deletion process.

■ Steps for Undeleting a CI

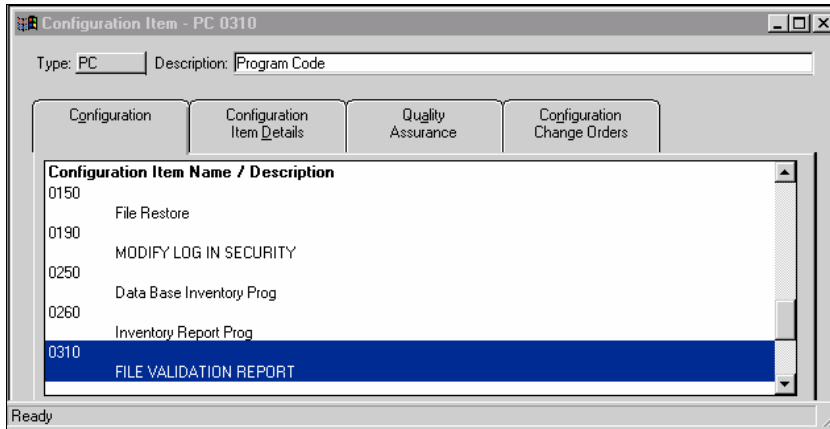
If you wish, you can undelete a CI that has been soft-deleted.

1. From the Configuration Item window **Configuration** tab, select the desired CI type code from the **Type** drop-down list.
2. Select **Deleted** from the **View** menu.



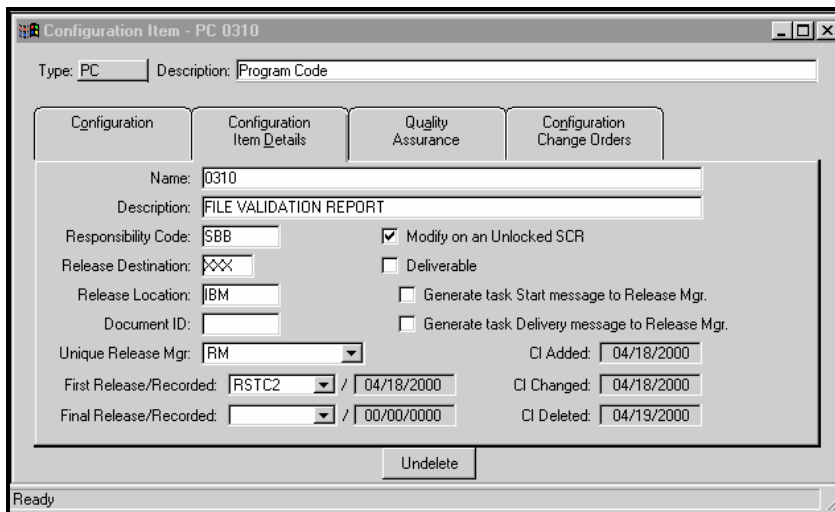
Deleted CI's will display in red on the **Configuration Item** tab until you reselect **Deleted** from the **View** menu.

3. Select the deleted CI you wish to undelete.



4. Select the **Configuration Item Details** tab.

After you select a deleted CI, the **Configuration Item Details** tab displays an **Undelete** button.



5. Modify any desired data.
6. Select the **Undelete** button.
7. Select the toolbar **Save** button.

After you select the **Undelete** button, the **CI Added** field updates to the date you undeleted the CI.

Configuration Item - PC 0310

Type: PC Description: Program Code

Configuration Configuration Item Details Quality Assurance Configuration Change Orders

Name: 0310

Description: FILE VALIDATION REPORT

Responsibility Code: SBB ☒ Modify on an Unlocked SCR

Release Destination: RPC ☒ Deliverable

Release Location: IBM ☒ Generate task Start message to Release Mgr.

Document ID: ☒ Generate task Delivery message to Release Mgr.

Unique Release Mgr: RM CI Added: 04/19/2000

First Release/Recorded: RSTC2 / 04/18/2000 CI Changed: 04/18/2000

Final Release/Recorded: / 00/00/0000 CI Deleted: 04/19/2000

Code used to identify the release destination of the Configuration Item.

■ Steps for Adding CI Quality Assurance Information

1. Select the Configuration Item window **Quality Assurance** tab.

Configuration Item - PC 0310

Type: PC Description: Program Code

Configuration Configuration Item Details Quality Assurance Configuration Change Orders

QA Technician: FTST 01

QA % Hours: 20

QA Hours: 16

☒ Automatically Generate QA CCO's

Indicates whether a Configuration Change Order is generated automatically.

2. From the **QA Technician** drop-down list, select the user ID of the QA technician who will be responsible for the CI.
3. In the **QA % Hours** field enter the percentage of CI development hours allotted for quality assurance.
4. Enter the number of quality assurance hours allotted for the selected CI in the **QA Hours** field.
5. If you want CCO's to be automatically generated, check the **Automatically Generate QA CCO's** check box.
6. Select the toolbar **Save** button.

■ Steps for Importing CI's and Making Mass Changes to CI's

Only the Technical Supervisor user type can import CI's and make mass changes to CI's.

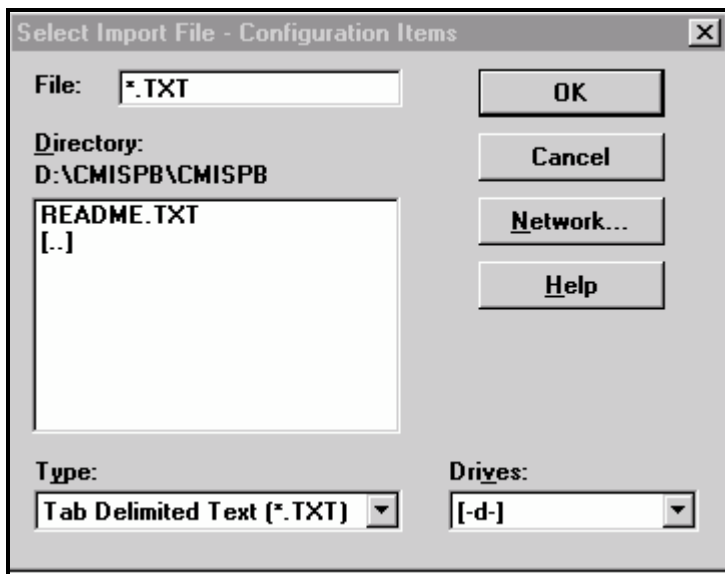
CMIS allows the import of four file formats: tab delimited text, comma delimited text, fixed length text, and Dbase (*.DBF) files. The tab delimited text file must contain the required data separated by tabs. The comma delimited text file must contain the required data separated by commas.

1. From the Configuration Item window, select **Import Configuration Items** from the **Tools** menu.



F
i

The Select Import File window opens.



2. Enter the name of the file you are importing in the **File** field, or use the **Directory** listing to locate the file.
3. Select the type of file you are importing from the **Type** drop-down list.
4. Select the **OK** button to import the file.

After the import, the Update Configuration Items window will open automatically. The Update Configuration Items window allows the CMIS Administrator to make mass changes to CI's rather than making desired changes to each CI individually.

CI Type	CI Name	CI Description	Responsibility Co
EC 0010		Nightly Batch	TE
EC 0020		Monthly Batch	TE
EC 0030		Daily Reports	TE
EC 0040		Weekly Reports	TE
EC 0050		Monthly Reports	TE
EC 0060		File Transfer	TE
EC 0070		File Reorganization	TE
EC 0080		File Backup	TE

UPDATE: All QA Percent Hours WITH: 20

WHERE: QA Percent Hours >= 0

Update (All/Selected) (Column) WITH (Value) WHERE (Column) (Operator) (Value)
 The where clause is optional and if left blank the update will be performed on (all/selected) rows.
 Example: UPDATE All AUTO_GEN_QA WITH Y WHERE CI_TYPE = PC

Error Description

Update Reset Save Close Help

You also can open this window by selecting **Maintain Configuration Items** from the **Tools** menu with the Configuration Item window open.



Tip You can select nonconsecutive rows to update by holding down the CTRL key while clicking on each desired row. To select consecutive multiple rows, hold down the SHIFT key while clicking on the first desired row, then the last desired row.

1. Select the desired update value from the **UPDATE** drop-down list: **All** to update all data elements or **Selected** to update selected data elements only.
2. From the drop-down list to the right of the **UPDATE** field, select the CI data element you are going update.
3. Enter in the **WITH** field the value that will replace the selected data element.

The **WHERE** drop-down lists allow users to define conditions under which all or selected CI data elements will be updated. The first drop-down list provides a list of the available data elements. The second drop-down list provides a list of operators. Wildcards are valid for all operators but cannot be contiguous. For all operators other than equals (=) and does not equal (<>), the wildcard * must start a comparison, i.e., *_V, or end a comparison, i.e. W_*. You cannot use a wildcard in the middle of a comparison, i.e., W_*_V. The third drop-down list provides a list of values. The **WHERE** values are optional but if left blank, the update will

apply to all or the selected CI data elements.

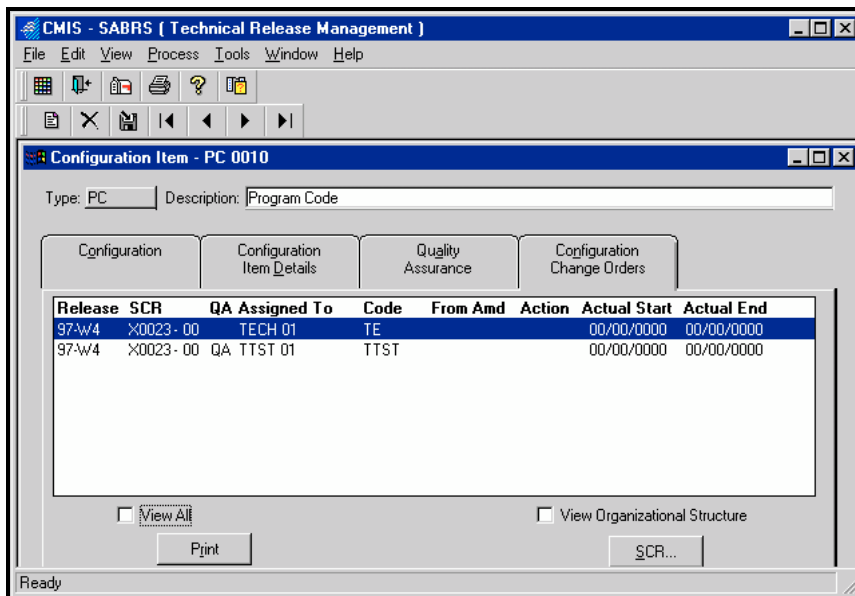
4. Select the desired data element from the first **Where** drop-down list.
In the next **Where** drop-down list select the desired operator.
In the last **Where** drop-down list enter an desired value.
5. Select the **Update** button to apply the changes.
5. Select the **Reset** button if you wish to negate any changes.
6. Select the **Save** button to save the changes to the CI data.

If errors prevent CMIS from changing the CI data, a description of the error will appear in the **Error Description** field.

■ Steps for Viewing CI CCO's

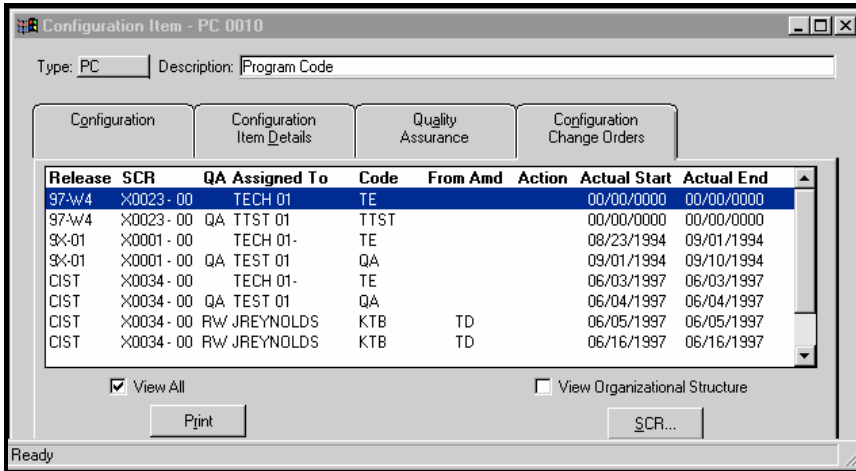
You can view all the CCO's associated with a CI or only the open CCO's.

1. Select the desired CI on the Configuration Item window **Configuration** tab.
2. Select the **Configuration Change Orders** tab.



The check boxes that display on the **Configuration Change Orders** tab depend on the user type and control the display of the CCO's. For most CMIS user types, only the **View All** check box will display. If this check box is empty, only open CCO's display in the list. To view open and closed CCO's, select the **View All** check box. For Employee and Action Manager user types, a **View Organizational Structure** check box will display on the **Configuration Change Orders** tab. Enabling this check box will display only the CCO's assigned to resources in the user's organizational structure. A third check box, **View Sub AMs**, displays only for Action Manager and Action Manager-Change Coordinator user types. Enabling this check box displays only CCO's assigned to Subaction Managers within the current user's organizational structure.

3. Select or unselect the desired check box(es).

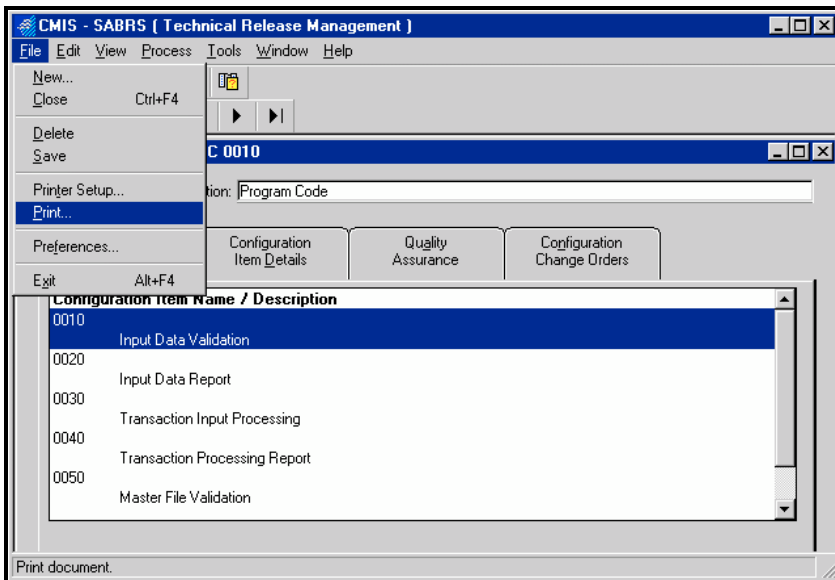


4. To view additional information about a CCO, select the desired CCO, then select the **SCR** button to open the **System Change Request Part Two** window.

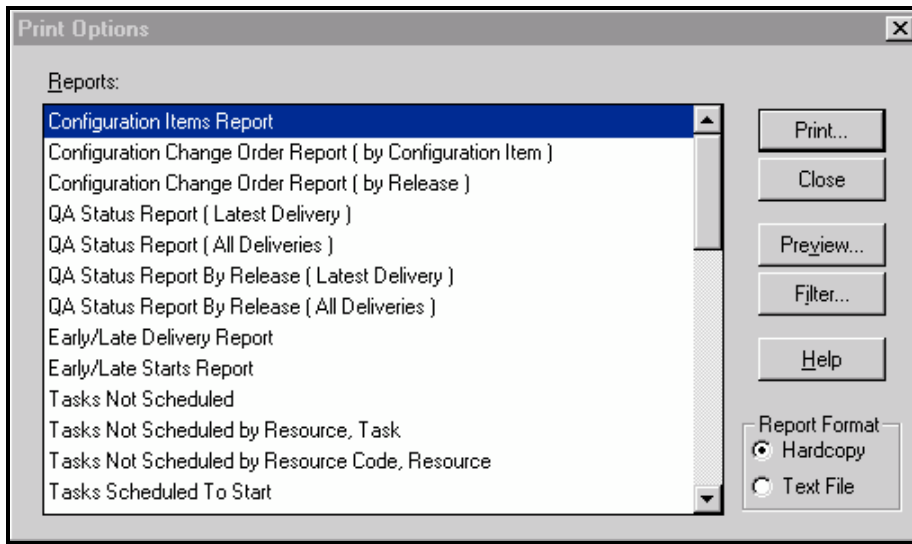
■ Steps for Printing the Configuration Items Report

If desired, you can generate and print the Configurations Items Report. You can tailor this report using the filter option.

1. From the Configuration Item window, select the **Print** toolbar button. You also can select **Print** from the **File** menu.



The Print Options window opens.



When you open the Print Options window from the Configuration Items window, the **Reports** list defaults to **Configuration Items Report**. The **Report Format** defaults to **Hardcopy**.

2. Select the **Filter** button if you wish to filter the report.
3. Select the **Preview** button to view the report on your monitor or the **Print** button to actually print the report.

Chapter 10 - System Change Request Window



Overview

Most CMIS actions are based on the system change request (SCR). An SCR can be the result of a change in a business practice, law or policy, technology, or it simply may be an enhancement or a system maintenance action. An SCR is a collection of information necessary to facilitate a developer's ability make the change and a tester's ability to validate the change. As system changes are made and implemented, the accumulation of SCR's provides a history of modifications to the system. Over time, this aggregate information repository is a major requirements resource for an automated information system (AIS).

SCR processes are accomplished via two windows: System Change Request and System Change Request Part Two. Each window has several tabs. The System Change Request window is divided into the following tabs:

Configuration Tab

Contains general information about the SCR.

Status Tab

Contains information on the category, ranking, and schedule dates of the selected SCR.

Customer Tab

Contains information on the resource who requested the change.

SCR X-Ref PTR's Tab

Allows users to view the program trouble reports (PTR's) that have a cross-reference with the selected SCR.

SCR X-Ref Tab

Allows authorized users to view and maintain information on relationships between SCR's from different AIS's.

The System Change Request Part Two window is divided into the following tabs:

Requirements Definition Tab

Contains a general description of the required change.

Functional Analysis Tab

Allows users to enter a detailed functional description of the system change.

Technical Analysis Tab

Allows users to enter a detailed technical description of the system change.

CCB Disposition Tab

Allows authorized users to enter a description of the configuration control board (CCB) disposition of the SCR.

Attachments Tab

Allows authorized users to view information on files created outside of CMIS that are associated with the selected SCR. Users can attach, remove, export, and view SCR attachments.

Configuration Change Orders Tab

Allows authorized users to view, modify, create, and delete configuration change orders.

Approvals Tab

Allows authorized users to view, create, modify, and delete SCR approvals.

Restrictions

- Access to create, modify, delete, and view SCR information depends on user type, security class, and SCR status. Refer to Chapter 3 for detailed information.

R System Change Request Window Options

Create a New SCR

Create an SCR Configuration Change Order (CCO)

Modify/Delete a CCO

Forward an SCR

Add an SCR Attachment

Create an SCR Amendment

Duplicate an SCR

Duplicate an SCR Outside the Current AIS

Create a PTR Cross-Reference

Create/Modify an SCR Approval

Create/Modify SCR Notes

Enter a CCB Disposition

Enter Technical/Functional Analysis

Change SCR Release Number/Target Release Number

Cancel an SCR

Reactivate an SCR

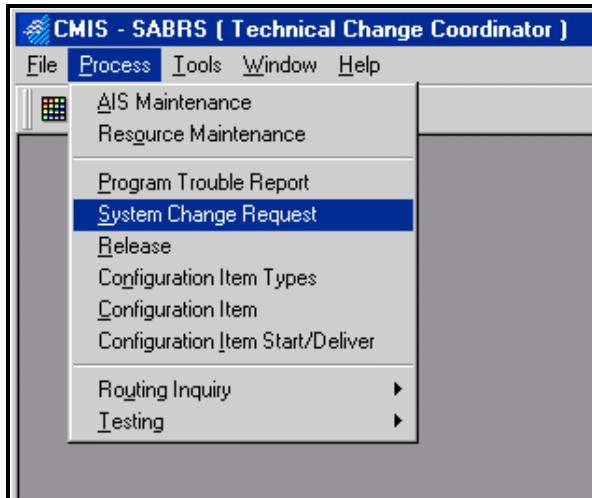
Delete an SCR

Filter SCR Data

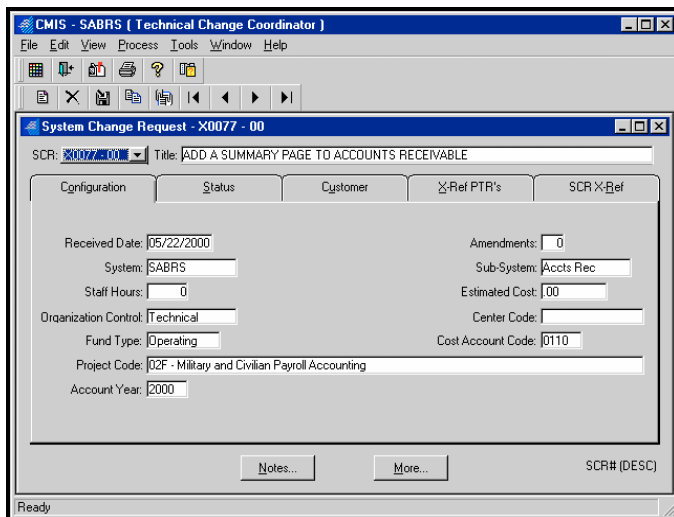
Sort SCR's

Print SCR Reports

Open the System Change Request window by selecting **System Change Request** from the **Process** menu.



The System Change Request window opens.

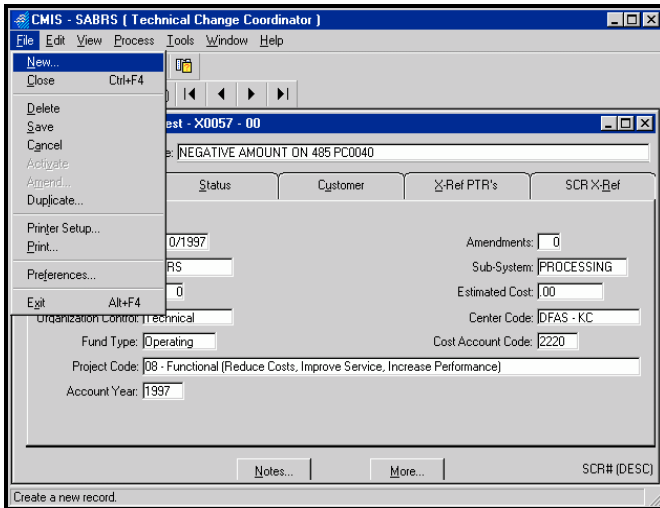


Steps for Creating a New SCR

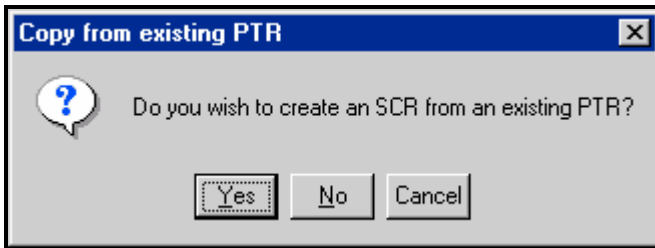
You can create a new SCR by entering all new required data or by copying data from a program trouble report (PTR). Users with the appropriate security classification access can create new SCR's.

The steps in this section address creating a new SCR from scratch. Refer to Chapter 6 for detailed information on creating a new SCR from a PTR.

1. From the System Change Request window, select the **New** toolbar button or select **New** from the **File** menu.

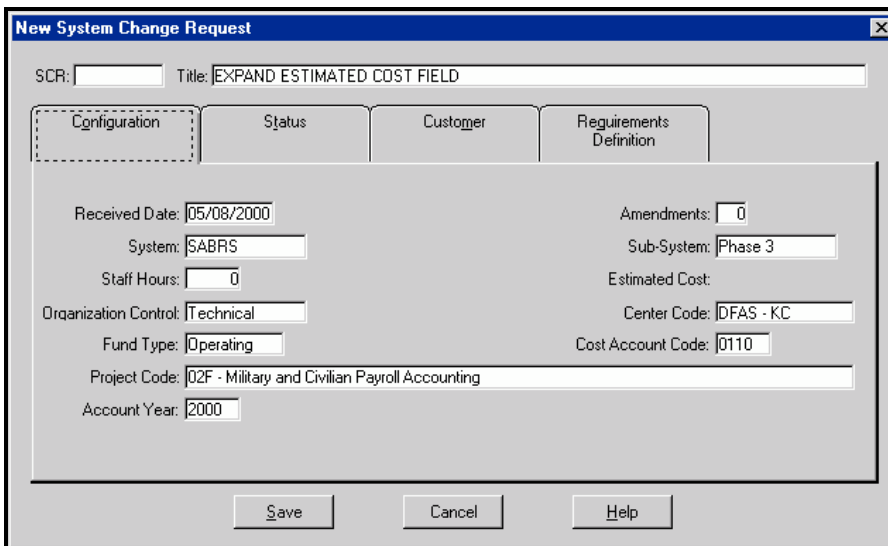


A message will ask if you wish to create the SCR from an existing PTR.



2. Select the **No** button.

The New System Change Request window opens.



You cannot change the default values for the **Configuration** tab **Received Date**, **System**, **Amendments**, **Organization Control**, and **Staff Hours** fields.

3. In the required **Title** field, enter a title for the new SCR.
4. Enter the sub-system affected in the required **Sub-System** field.
5. If desired, you can change the default values for the following **Configuration** tab fields: **Fund Type**, **Project Code**, **Account Year**, and **Cost Account Code**.
6. Select the **Status** tab.

The screenshot shows the 'New System Change Request' window with the 'Configuration' tab selected. The 'SCR' field is empty, and the 'Title' field contains 'EXPAND ESTIMATED COST FIELD'. The 'Status' tab is also visible. The 'Current Status' is 'Pending', 'Ranking No.' is '0', 'Category' is 'T - Technical', 'Sub-Category' is 'AA', 'Release' is '99999', 'Target Release' is '99999', 'Scheduled Date' is '12/31/1999', 'Target Scheduled Date' is '12/31/1999', 'WBS Level 1' is empty, 'WBS Level 2' is empty, 'Completion By' is '07/01/2000', 'Last Modified Date' is '05/08/2000', 'Relation' is empty, and 'Permanent' is unchecked. At the bottom are 'Save', 'Cancel', and 'Help' buttons.

For a new SCR, the **Current Status** value defaults to **Pending**. The **Release** and **Target Release** fields default to **99999**, the release number for SCR's with a **Pending** status.

7. You can change the default **0.0** value in the **Ranking No** field although the configuration control board (CCB) usually assigns the SCR ranking.
8. Select a category from the required **Category** drop-down list.
9. Select the **Customer** tab.

The screenshot shows the 'New System Change Request' window with the 'Customer' tab selected. The 'SCR' field is empty, and the 'Title' field contains 'EXPAND ESTIMATED COST FIELD'. The 'Customer' tab is highlighted. The 'Prepared By' field contains 'Technical Change Coordinator', 'Prepared Date' is '05/08/2000', 'POC Name' is 'John Doe', 'POC Code' is 'TE', 'DSN Phone' is '922-2990 x', 'Commercial Phone' is '(850)452-2990', 'Requesting Activity' is 'DFAS XX', 'UIC' is '12345', and 'Customer Control No.' is '789987'. At the bottom are 'Save', 'Cancel', and 'Help' buttons.

10. The required **Prepared By** field defaults to the current user's ID but you can change this

value if necessary.

11. The **Prepared Date** defaults to the current date but you can change this value if necessary.
12. Enter the name of the SCR point of contact (POC) in the **POC Name** field.

You must enter a value for either **DSN Phone** or **Commercial Phone**.

13. Enter a DSN phone number in the **DSN Phone** field, or enter a commercial phone number in the **Commercial Phone** field. You can enter a value for both phone fields, but at least one of two must have an entry.
14. Enter the name of the **Requesting Activity**. This value defaults to the current user's activity ID.
15. Enter the unit identification code (UIC) of the requesting activity in the **UIC** field, if available.
16. Select the **Requirements Definition** tab.

When creating a new SCR, you must enter a requirements definition. Generally, this definition describes the system change in enough detail so it can be further developed or tested by a technical team. Access to modify the requirements definition depends on your organization type, your user type, and SCR status. User type Configuration Manager (CM) can modify a requirements definition regardless of organization type or SCR status.

17. Enter a value for the **Requirements Definition**. You can import a definition from an external text file by selecting the **Import** button, or save the definition to an external text file by selecting the **Export** button.
18. Select the **Save** button to save the new SCR.

After you select **Save**, the New System Change Request window closes and CMIS assigns the next sequential number to the new SCR. All SCR numbers are unique within any given AIS.

■ Steps for Creating an SCR Configuration Change Order (CCO)

A CCO identifies the detailed tasks necessary to implement an SCR. Each CCO is associated with an approved SCR or SCR amendment and provides authorization to change the AIS. Access to create or modify a CCO depends on your security class and the SCR status.

1. Select the System Change Request window **More** button.

The System Change Request Part Two window opens.

2. Select the **Configuration Change Orders** tab.

From	Amd QA	Configuration Item	Org. Type	Assigned To / Code	Actual Start/End	Est Hrs/ Actual	Est Size/ Actual
	QA ##		Technical	TTST 01 / TTST	00/00/0000	4	0
		SCR Test			00/00/0000	0	0

3. Select the **Add** button

The Add/Configure CCO window opens.

- If you wish, you can select a value from the optional **Purpose** drop-down list: **Maintain** if a configuration item will be modified by this SCR, **Initialize** if a configuration item will be added to the system by this SCR, or **Remove** if the SCR will remove a CI from the system.
- Enter an estimate of the number of staff hours required to complete the CCO in the **Estimated Hours** field, if necessary. A value for **Estimated Hours** is required only if the AIS Maintenance window **Require Estimated Staff Hours** check box is checked.
- From the **CI Type** drop-down list select the applicable two-letter code. A value is required.
- Select the desired value from the **CI Name** drop-down list. A value is required.
- In the **Assign To** field, select the resource responsible for the CCO from the drop-down list or leave this value blank.
- In the **Size of Change** field enter a value representing the scope of implementing the CCO. A value is required only if the AIS Maintenance window **Maximum Change Size** field contains a value greater than 0 (zero).

10. In the **Change Note** field enter any additional information about the CCO.
11. Select the **Save** button to save the new CCO.

After you save the new CCO the Add/Configure CCO window will remain open, allowing you to add more CCO's if you wish. Enter data for another new CCO over the existing data, selecting the **Save** button for each new CCO you create.

12. Select the **Close** button when you have finished adding new CCO's.

■ Steps for Modifying or Deleting a CCO

1. Select the System Change Request Part Two window **Configuration Change Orders** tab.
2. Select the CCO you wish to modify.

The screenshot shows the 'System Change Request Part Two - X0014 - 00' window. The 'Configuration Change Orders' tab is selected. The window displays a table with columns: From Amd QA, Configuration Item, Org. Type, Assigned To / Code, Actual Start/End, Est Hrs/ Actual, and Est Size/ Actual. The table contains several rows of data, including PC 0030, QA ##, SCR Test, and QA PC 0030. Below the table are buttons for Add..., Delete, Configure..., Locate..., and Print. At the bottom are buttons for Notes, Save, Cancel, and Help.

From Amd QA	Configuration Item	Org. Type	Assigned To / Code	Actual Start/End	Est Hrs/ Actual	Est Size/ Actual
PC	0030	Technical	PROG 01 / PR	00/00/0000	15	5
QA ##	SCR Test	Technical	TTST 01 / TTST	00/00/0000	4	0
QA PC	0030	Technical		00/00/0000	8	0

3. To search for the CCO you wish to modify, select the **Locate** button.

The Find Configuration Change Order (CCO) window opens.

The screenshot shows the 'Find Configuration Change Order (CCO)' window. It has three input fields: QA Flag (a dropdown menu), CI Type (a text box containing 'PC'), and Configuration Item (a text box containing '0030'). Below these fields are buttons for OK, Cancel, and Help.

4. Enter the desired search values in the **QA Flag**, **CI Type**, and **Configuration Item** fields, then select the **OK** button.

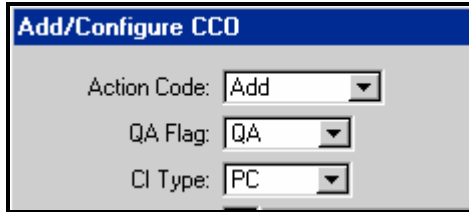
The Find Configuration Change Order (CCO) window will close and the selected CCO will

be highlighted in the CCO's list.

5. Select the **Configure** button. The Add/Configure CCO window will open.
6. Enter the desired changes, then select the **Save** button.

To delete a CCO, select the desired CCO then select the **Delete** button. When you delete a development CCO, the matching QA CCO is also deleted.

When you are creating or configuring a CCO for an SCR amendment, the Add/Configure CCO window will contain an **Action Code** drop-down list. **Action Code** values include **Add**, **Change**, and **Delete**.



Additionally, when configuring a CCO for an SCR amendment the following restrictions apply:

- If the CCO is on an unlocked SCR amendment and the CCO has ended, you can only modify the **Actual Hours** field.
- If the CCO has started, you can modify the **CI Name**, **Assign To**, and **Estimated Hours** field. You can modify the **CI Name** only to assign a CI that can be started on an unlocked SCR.

SCR Forwarding Options

Initial Entry

Supervisor

Requirements Review

Functional Analysis

Transfer of Control

Technical Analysis

Requirements Rewrite

Higher Authority

Initial/Final Impacting

Locked

CM Certified

There are many different reasons for forwarding an SCR. When a user creates an SCR, nothing further will happen to the SCR until it is forwarded. Forwarding an SCR can result in the following actions:

- Transfer control of the SCR from one user to another.
- Temporarily grant limited SCR modification access to one or more users.
- Return the SCR to the controlling user after modifications have been completed.

Your access to SCR forwarding and the contents of the Forwarding window depend on the SCR's status, the forwarding reason, your organization type, and your user type. This section addresses the steps for performing each type of SCR forwarding. As you review the steps, keep in mind that these steps reflect the most typical user type for the SCR forwarding type. Of course, most CMIS users will not be able to select from such a variety of user roles.

Each SCR forwarding action creates a routing entry that displays on the System Change Request Part Two window **Approvals** tab. When a user forwards an SCR, CMIS will generate a mail message to notify the SCR recipient(s).

Type	Sent Date	Complete Date	Seq	Notes	From AM	Approved/Rejected	Rejection Reason
Final Impacting To: TTST AM Technical Action Manager	08/25/1994	08/25/1994	00	N	N	Approved	
Locked To: CM Technical Configuration Mgmt.	00/00/0000	08/25/1994		N	N	Approved	

Three SCR forwarding types are CMIS-initiated: **Initial Entry**, **Locked**, and **CM Certified**.

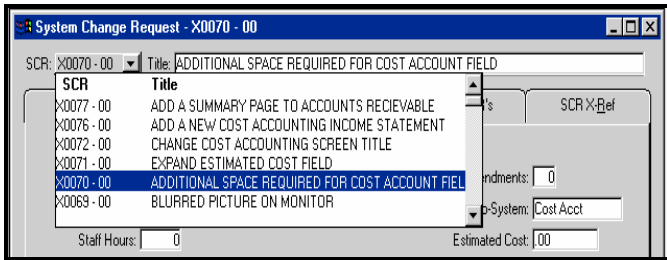
Initial Entry is a routing CMIS creates for each new SCR, regardless of the originator's role. **Initial Entry** forwarding sets an *open* routing for the SCR. An open routing is a routing that has a start date but no completion date. For example, a Technical AM (Action Manager) starts the routing of an SCR by forwarding the SCR to a Technical Employee. The resulting routing is *open* and has a start date but no completion date. When the Employee returns the SCR to the Technical AM, the routing is *closed* and has both start and complete dates.

The **Locked** and **CM Certified** routings do not grant users access to, or transfer control of, an SCR. When the SCR's release is locked, CMIS automatically creates the **Locked** routing; when configuration management certifies the release, CMIS creates the **CM Certified** routing automatically.

■ Steps for Supervisor SCR Forwarding

This type of SCR forwarding occurs when an Employee creates a new SCR and forwards it to their AM, or when an AM or Remote User creates an SCR and forwards it to their Change Coordinator. In the following steps, assume you are a Technical Employee forwarding a new SCR to your Technical AM.

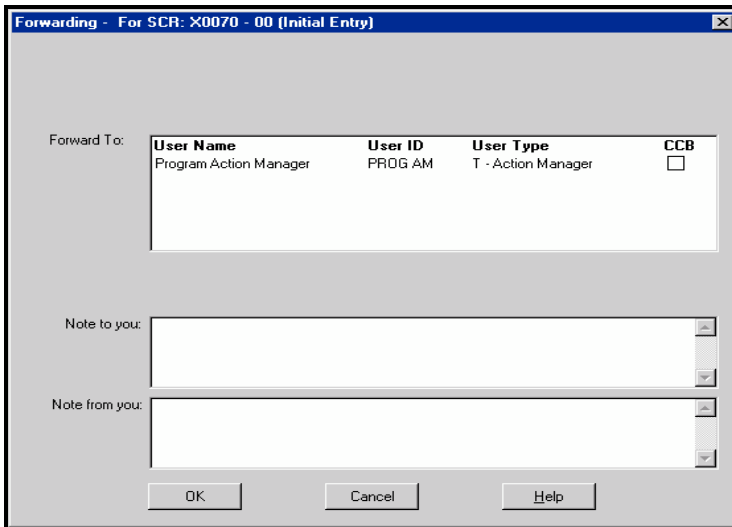
1. Select the desired SCR from the **SCR** drop-down list.



2. Select the **Forward** toolbar button. You could also select **Forward** from the **Edit** menu.



The Forwarding window opens.



F

The **Forward To** list includes only users to whom you can forward the SCR. In this example, as a Technical Employee the only available user is your Technical AM.

You can enter comments in the **Note from you** field.

3. Select the **OK** button to forward the SCR.

A message confirms the forwarding action. CMIS will generate a mail message to notify the Technical AM of the SCR forwarding.

■ Steps for Requirements Review SCR Forwarding

Action Managers can forward temporary SCR's to their Employees for **Requirements Review**. This forwarding action grants the Employee limited access to SCR's with a **Temporary** status. Change Coordinators also can forward SCR's for **Requirements Review**. In the following steps, assume you are a Technical AM forwarding a temporary SCR to one of your Employees.

1. On the System Change Request window, select the desired SCR from the **SCR** drop-down list.
2. Select the **Forward** toolbar button.

The Forwarding window opens.

User Name	User ID	User Type	CCB
Technical Employee One	TECH 01	T - Employee	<input type="checkbox"/>
Technical Employee Two	TECH 02	T - Employee	<input type="checkbox"/>
Technical Employee Three	TECH 03	T - Employee	<input type="checkbox"/>

The Forwarding window contents for an AM includes a **User Type** field and three buttons: **All**, **Group**, and **Clear**. The AM can select the desired **User Type** value for the SCR forwarding: **Employee**, **AM**, or **Change Coordinator**. When the AM selects a **User Type**, the **Forward To** list will include only users of the selected type. To forward the SCR to all users in the **Forward To** list, select the **All** button. To select some but not all of the listed users, click on each desired user. To unselect users, select the **Clear** button.

The **Group** button is unavailable unless the forwarding user has established address groups in CMIS mail. If you select the **Group** button, the SCR Forwarding Mail Group Selection window opens.



You can select the desired mail group(s) from this window. Select **OK** and the SCR Forwarding Mail Group Selection window will close. CMIS will add group members with user types appropriate for this routing to the **Forward To** list.

3. Select **Employee** from the **User Type** drop-down list.
 4. Select the desired user from the **Forward To** list.
- If you wish, you can enter comments in the **Note from you** field.
5. Select the **OK** button to forward the SCR.

A message will confirm the forwarding. In this example, CMIS will generate a mail message to notify each selected group member of the Technical AM's SCR forwarding.

This back-and-forth forwarding between an Employee and AM can continue until the AM is satisfied the SCR is accurate and valid, or the SCR is deleted. During this forwarding phase, the SCR's status remains **Pending**. When the AM forwards the SCR to the Change Coordinator the routing is closed, control of the SCR is transferred, and the SCR **Permanent** check box will be checked automatically to indicate the SCR is now permanent.

■ Steps for Functional Analysis SCR Forwarding

Functional analysis provides a detailed functional description of the system change. It describes how the change elements should operate when the SCR is implemented, and is more detailed than the requirements description without containing the technical detail of the technical analysis. Access to enter or modify functional analysis depends on your organization type, your user type, and the status of the SCR. In the following steps, assume you are a Functional Change Coordinator (FCC) forwarding the SCR for functional analysis.

1. On the System Change Request window, select the SCR you wish to forward from the **SCR** drop-down list.
2. Select the **Forward** toolbar button.

The Forwarding window opens. The Forwarding window for this forwarding action contains a **Reason** drop-down list.

Forwarding - For SCR: X0077 - 00

Reason: **Functional Analysis**

Forward To:

User Name	User ID	User Type	CCB
Functional Test Action Manager	FTST AM	F - Action Manager	<input type="checkbox"/>
Functional Action Manager	FUNC AM	F - Action Manager	<input type="checkbox"/>
Requirements Action Manager	REQR AM	F - Action Manager	<input type="checkbox"/>
Functional Change Coordinator	FCC	F - Change Coordinator	<input type="checkbox"/>

Note to you:

Note from you:

OK Cancel Help

3. Select **Functional Analysis** from the **Reason** drop-down list.

Forwarding - For SCR: X0077 - 00

Reason: **Functional Analysis**

Forward To:

Functional Analysis

Technical Analysis

Requirements Review

Requirements Rewrite

Initial Impacting

Final Impacting

Transfer Control

All Group Clear

4. Select the users who will perform functional analysis on the SCR.

If you wish, enter comments in the **Note from you** field.

5. Select the **OK** button to forward the SCR

A message will confirm the forwarding. CMIS will generate a mail message to notify recipients of the SCR forwarding.

A Functional AM who receives the SCR forwarding for functional analysis can either complete the analysis and return the SCR to the FCC, or forward the SCR to one or more of their Employees or Sub AM's for functional analysis. When the Functional AM forwards the SCR, the Forwarding window **User Type** drop-down list will include both possible forwarding actions: **Employee** and **Return to Change Coordinator**.

■ Steps for Transfer of Control SCR Forwarding

This SCR forwarding type transfers control of an SCR from or to an FCC or TCC. When a **Transfer of Control** forwarding occurs, the **Organization Control** field on the System Change Request window **Configuration** tab will update to **Technical** if forwarded to a TCC or **Functional** if forwarded to an FCC. In the following steps, assume you are an FCC transferring control of an SCR to the TCC.

1. On the System Change Request window, select the desired SCR from the **SCR** drop-down list.
2. Select the toolbar **Forward** button.

The Forwarding window opens.

**F
i
g**

From the **Reason** drop-down list select **Transfer of Control**.

3. Enter any comments in the **Note from you** text field.
4. Select the **OK** button.

A message will confirm the forwarding action. CMIS will generate a mail message to notify the recipient of the SCR forwarding. This forwarding action will update the System Change Request window **Configuration** tab **Organization Control** value to **Technical**.

■ Steps for Technical Analysis SCR Forwarding and Returning the SCR

TCC's use SCR Technical Analysis forwarding to grant recipients limited access to permanent SCR's to modify the SCR technical analysis text and CCO data, and add SCR attachments. In the following steps, assume you are the TCC forwarding an SCR to three Technical AM's for technical analysis.

1. On the System Change Request window, select the desired SCR from the **SCR** drop-down list.
2. Select the **Forward** toolbar button.

The Forwarding window opens.

Forwarding - For SCR: X0077 - 00

Reason: Technical Analysis

Forward To:

User Name	User ID	User Type	CCB
Release Manager	RM	T - Release Management	<input type="checkbox"/>
Program Action Manager	PROG AM	T - Action Manager	<input type="checkbox"/>
Technical Action Manager	TECH AM	T - Action Manager	<input type="checkbox"/>
Technical Test Action Manager	TTST AM	T - Action Manager	<input type="checkbox"/>

Note to you: None.

Note from you:

OK Cancel Help

3. Select the desired **Forward To** users.
4. Enter any comments in the **Note from you** text field.
5. Select the **OK** button.

A message will confirm the forwarding action. CMIS will generate a mail message to notify recipients of the SCR forwarding. This forwarding action will update the SCR status to **Pending Technical Analysis**.

When Technical AM's who received the SCR for technical analysis complete the analysis,

they return the SCR to the TCC. When a Technical AM returns the SCR to the TCC, the Forwarding window **User Type** drop-down list will contain a value for **Return to Change Coordinator**. The Technical AM selects **Approve**, **Reject**, or **Not Applicable** from the **Approve/Reject** drop-down list, and can enter comments in the **Note from you** text field.

Forwarding - For SCR: X0077 - 00 (Technical Analysis)

Forwarded to you from: Technical Change Coordinator (Technical Change Coordinator)

User Type: Return to Change Coordinator

Forward To:

All Group Clear

User Name	User ID	User Type	CCB
Technical Change Coordinator	TCC	T - Change Coordinator	<input type="checkbox"/>

Approve/Reject: Approve

In this example, the TCC forwarded the SCR to three Technical AM's. When all three have returned the SCR to the TCC, the SCR status will update to **Accepted Technical Analysis**. The TCC can evaluate the SCR and return the SCR to the AM's for additional work or forward the SCR to other users for various purposes.

■ Steps for Requirements Rewrite SCR Forwarding

Change Coordinators use this SCR forwarding type to grant recipients limited access to permanent SCR's for the purpose of modifying the SCR's requirements. When forwarding an SCR for requirements rewrite, you usually forward the SCR to the user responsible for the original requirements. For the following steps, assume you are the TCC forwarding the SCR to a Technical AM.

1. On the System Change Request window, select the desired SCR from the **SCR** drop-down list.
2. Select the **Forward** toolbar button.

The Forwarding window opens.

Forwarding - For SCR: X0077 - 00

Reason: Requirements Rewrite

Forward To:

All Group Clear

User Name	User ID	User Type	CCB
Release Manager	RM	T - Release Management	<input type="checkbox"/>
Program Action Manager	PROG AM	T - Action Manager	<input type="checkbox"/>
Technical Action Manager	TECH AM	T - Action Manager	<input checked="" type="checkbox"/>
Technical Test Action Manager	TTST AM	T - Action Manager	<input type="checkbox"/>
Technical Change Coordinator	TCC	T - Change Coordinator	<input type="checkbox"/>

Note to you: None.

Note from you: All Requirement Re-write submissions must be submitted within 3 working days.

OK Cancel Help

3. Select the forwarding reason from the **Reason** drop-down list.
4. Select the desired Technical AM user from the **Forward To** field.
5. Enter any comments in the **Note from you** field.
6. Select the **OK** button to forward the SCR.

A message will confirm the forwarding action. CMIS will generate a mail message to notify the Technical AM of the SCR forwarding.

■ Steps for Higher Authority SCR Forwarding

Change Coordinators use this SCR forwarding type to obtain Higher Authority approval for SCR's that exceed the cost threshold set for the AIS. This forwarding action grants allows the Higher Authority user to approve or reject the SCR; it does not grant that user access to modify the SCR. The SCR is routed for approval or rejection only. An SCR that exceeds the cost threshold cannot be locked in a release.

1. From the System Change Request window, select the desired SCR from the **SCR** drop-down list.
2. Select the **Forward** toolbar button.
3. You can enter any comments in the **Note from you** field.
4. Select the **OK** button to forward the SCR.

Forwarding - For SCR: X0070 - 00

Reason: Higher Authority

Forward To:

All Group Clear

User Name	User ID	User Type	CCB
Higher Authority	HA	T - Higher Authority	<input checked="" type="checkbox"/>

Note to you: None.

Note from you:

OK Cancel Help

A message will confirm the forwarding action. CMIS will generate a mail message notifying the recipient of the SCR forwarding, and will update the SCR's status to **Higher Authority**. If the Higher Authority user approves the SCR and returns it, the SCR status will update to **Accepted Higher Authority**.

■ Steps for Initial/Final Impacting SCR Forwarding

The Change Coordinator forwards SCR's that require impacting to the appropriate AM(s). Impacting involves identifying the configuration items that require changes, who will make the changes, and how long the work will take. CCO generation is the only function that takes place during impacting. There are two SCR impacting routings: initial and final. The primary difference between initial and final impacting is the status of the SCR when the impacting options are complete. When the SCR is forwarded for final impacting, the Change Coordinator is asking the action managers for their best and final CCO generation. The steps for SCR forwarding for initial and final impacting are the same, except for the value you select from the Forwarding window **Reason** drop-down list. In the following steps, assume you are the TCC forwarding the SCR to three Technical AM's for initial impacting.

1. Select the desired SCR from the **SCR** drop-down list.
2. Select the **Forward** toolbar button.

The Forwarding window opens.

User Name	User ID	User Type	CCB
Release Manager	RM	T - Release Management	<input type="checkbox"/>
Program Action Manager	PRDG AM	T - Action Manager	<input type="checkbox"/>
Technical Action Manager	TECH AM	T - Action Manager	<input type="checkbox"/>
Technical Test Action Manager	TTST AM	T - Action Manager	<input type="checkbox"/>

F
i

3. Select **Initial Impacting** from the **Reason** drop-down list.
4. Select each desired user from the **Forward To** list.
5. Enter any comments in the **Note from you** field.
6. Select the **OK** button to forward the SCR.

A message will confirm the forwarding action. CMIS will generate a mail message notifying the recipients of the SCR forwarding.

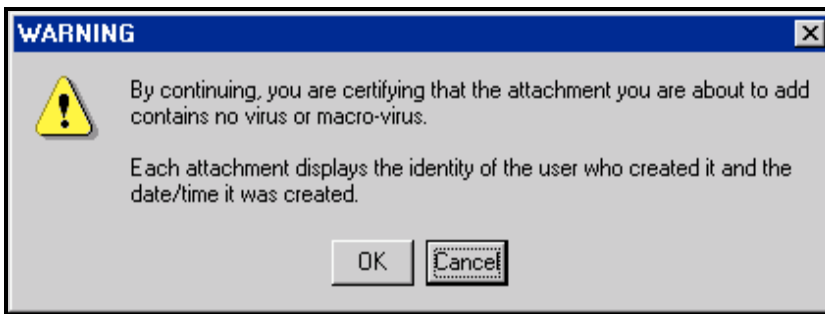
■ Steps for Adding an SCR Attachment

You can attach external files to the SCR. External files are files created outside of CMIS, for example a Microsoft® Word document. Users with an open routing for requirements rewrite, requirements definition, functional analysis, technical analysis, initial impacting, final impacting, or higher authority approval can attach files to the SCR. Authorized users also can remove, export, and view SCR attachments. SCR attachments are stored in the CMIS database rather than on an individual workstations or the LAN (local area network), allowing users to access attachments regardless of their location.

1. Select the System Change Request window **More** button to open the System Change Request Part Two window.
2. Select the **Attachments** tab.

3. Select the **Add** button.

A CMIS warning message will display.

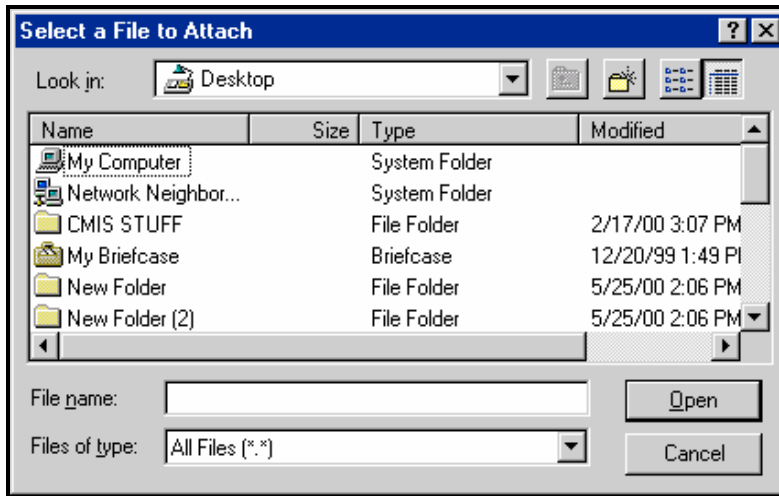


4. Select the **OK** button if you're sure the file you wish to attach is virus-free.

The Add SCR Attachment window will open.

5. In the **Filename** field enter the complete path of the file you wish to attach, or select the **Browse** button to locate the file.

If you select the **Browse** button, the Select a File to Attach window opens

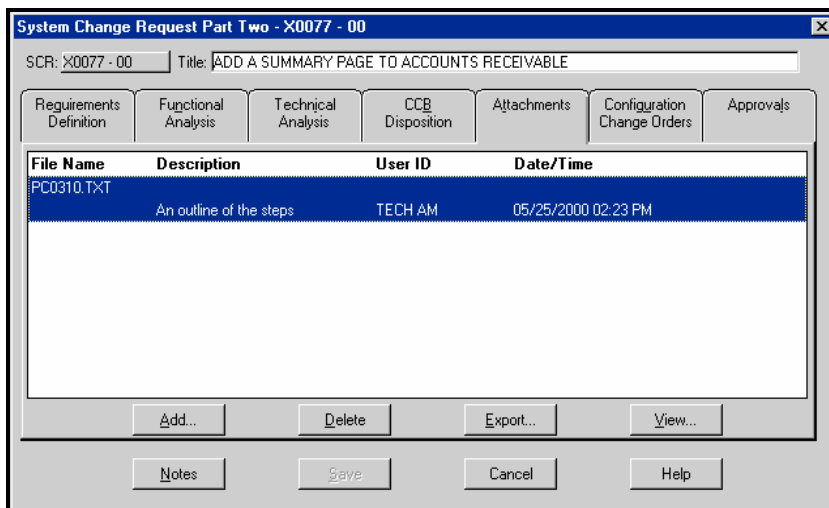


6. Locate the desired file, then select the **Open** button.

The Select a File to Attach window will close, and the file path and name will display in the **Filename** field.

7. Enter a short description of the attachment in the **Description** field.
8. Select the **Save** button.

The Add SCR Attachment window will close and the selected file will display on the **Attachments** tab.



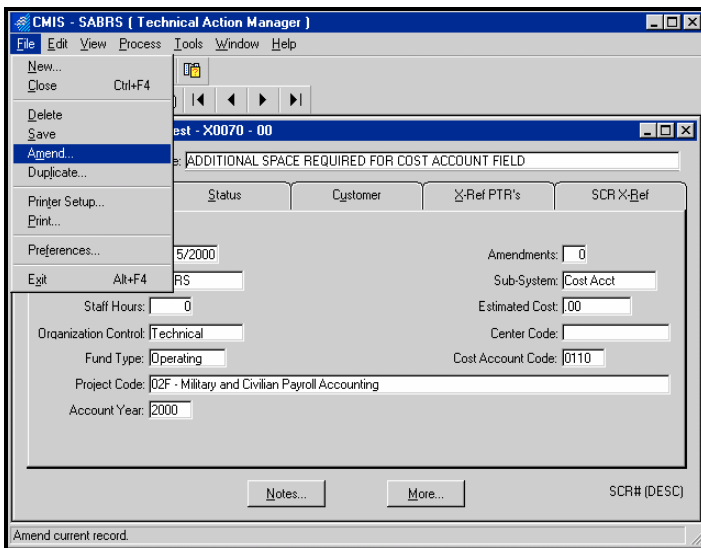
Tip The **View** button opens the attached file in its associated application. For example, if the attached file is a Microsoft Word document, the **View** button will open the file in Microsoft Word.

Steps for Creating an SCR Amendment

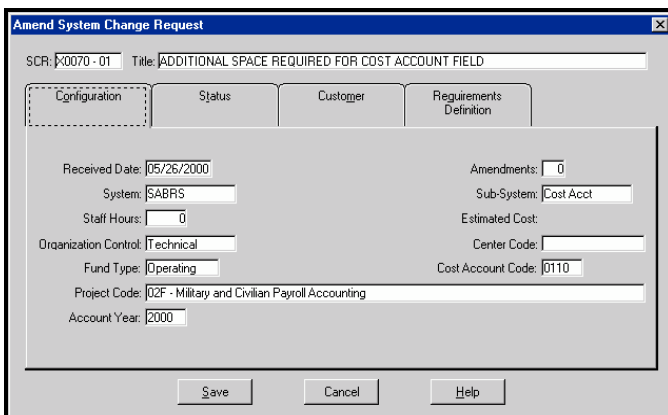
An amendment is a modification to an SCR. There are two settings on the AIS Maintenance window that affect SCR amendments. If the AIS maintenance window **Allow amendments on unlocked SCR's** check box is unchecked, users can modify a locked SCR by amending it. Users cannot amend SCR's unless the value in the AIS Maintenance window **Maximum SCR Amendments** field is greater than 0 (zero). User types Remote User and CMIS Administrator cannot create SCR amendments. Only users with the appropriate security classification can create a new SCR amendment.

Users forward SCR amendments using the same reasons and methods as when they forward SCR's. The one difference is that CCO's attached to amendments are folded into the parent SCR when that SCR's release is locked.

1. From the System Change Request window, select **Amend** from the **File** menu.



The Amend System Change Request window opens.



The amendment will have the same title as its parent SCR. CMIS will assign the amendment a number. In this example, as the first amendment to SCR **X0070**, the amendment is numbered **X0070-01**.

2. Select the **Requirements Definition** tab, and enter a description of the required change.

You can import a definition from an external text file by selecting the **Import** button, or save the definition to an external text file by selecting the **Export** button.

The screenshot shows the 'Amend System Change Request' window. At the top, the 'SCR:' field contains 'X0070 - 01' and the 'Title:' field contains 'ADDITIONAL SPACE REQUIRED FOR COST ACCOUNT FIELD'. Below the title bar are four tabs: 'Configuration', 'Status', 'Customer', and 'Requirements Definition'. The 'Requirements Definition' tab is selected, displaying a text area with the requirement: 'The additional space required for the cost account field must be greater than 10 but not more than twenty bytes.' At the bottom of the window are three buttons: 'Export', 'Import', and 'Save'. Below these are 'Cancel' and 'Help' buttons.

3. Select the **Configuration** tab.

The screenshot shows the 'Amend System Change Request' window with the 'Configuration' tab selected. The 'SCR:' field contains 'X0070 - 01' and the 'Title:' field contains 'ADDITIONAL SPACE REQUIRED FOR COST ACCOUNT FIELD'. The 'Configuration' tab displays various fields with default values: 'Received Date' (05/30/2000), 'System' (SABRS), 'Staff Hours' (0), 'Organization Control' (Technical), 'Fund Type' (Operating), 'Project Code' (02F - Military and Civilian Payroll Accounting), 'Account Year' (2000), 'Amendments' (0), 'Sub-System' (Cost Acct), 'Estimated Cost', 'Center Code', and 'Cost Account Code' (0110). At the bottom are 'Save', 'Cancel', and 'Help' buttons.

CMIS provides default values for the **Received Date**, **System**, **Amendments**, **Organization Control**, and **Staff Hour** fields. The **Sub System**, **Center Code**, **Fund Type**, **Cost Accounting Code**, **Project Code**, and **Account Year** fields contain default values from the parent SCR.

4. Select the **Status** tab.

The screenshot shows the 'Amend System Change Request' window with the 'Status' tab selected. The window title is 'Amend System Change Request'. The SCR number is 'X0070 - 01' and the title is 'ADDITIONAL SPACE REQUIRED FOR COST ACCOUNT FIELD'. The tabs are Configuration, Status (selected), Customer, and Requirements Definition. The form contains the following fields:

Current Status: Pending	Ranking No: .0
Category: T - Technical	Sub-Category:
Release: 99999	Target Release: 99999
Scheduled Date: 12/31/1999	Target Scheduled Date: 12/31/1999
WBS Level 1:	WBS Level 2:
Completion By: 00/00/0000	Last Modified Date: 05/30/2000
Relation:	Permanent: <input type="checkbox"/>

Buttons at the bottom: Save, Cancel, Help.

5. Select the desired value from the **Current Status** drop-down list. For a new SCR amendment, the default value is **Pending**.
6. Select the **Customer** tab

The screenshot shows the 'Amend System Change Request' window with the 'Customer' tab selected. The window title is 'Amend System Change Request'. The SCR number is 'X0070 - 01' and the title is 'ADDITIONAL SPACE REQUIRED FOR COST ACCOUNT FIELD'. The tabs are Configuration, Status, Customer (selected), and Requirements Definition. The form contains the following fields:

Prepared By: Technical Employee One	Commercial Phone: () -
Prepared Date: 05/30/2000	UIC: 12345
POC Name: Chris Brown	
POC Code: TE	
DSN Phone: 452-2990 x	
Requesting Activity: DFAS-XX	
Customer Control No: 55555	

Buttons at the bottom: Save, Cancel, Help.

7. The **Prepared By** field defaults to the current user. If you wish, you can modify this value.
8. The **Prepared Date** field defaults to the current date. If you wish, you can modify this value.

The **POC Name**, **POC Code**, **DSN Phone**, **Commercial Phone**, **UIC**, and **Customer Control Number** are values from the parent SCR.

9. Select the **Save** button to save the new amendment.

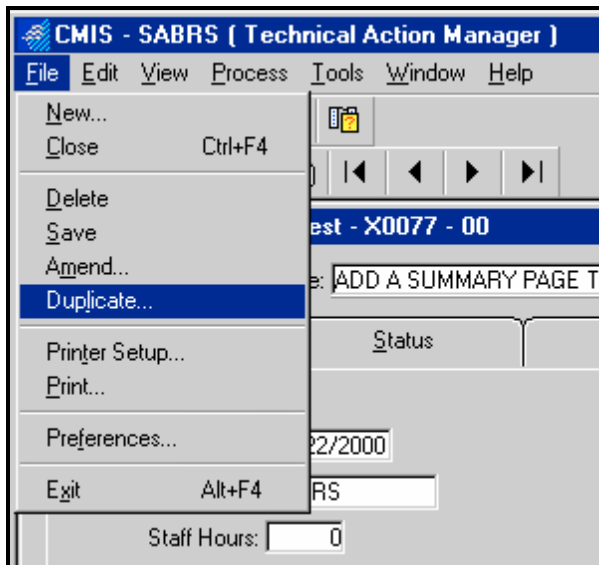
■ Steps for Duplicating an SCR

Access to duplicate an SCR within the current AIS is available to all user types with the

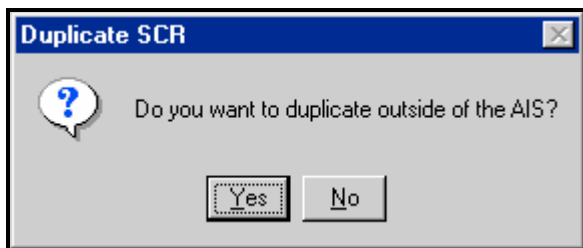
appropriate security classification. Duplicating an SCR allows you to copy an existing SCR, then use it as the basis for a new SCR.

When you duplicate an SCR, CMIS automatically copies data from the existing SCR to the duplicated SCR and provides default values for several fields. After you duplicate the existing SCR, you can enter new data to replace any existing data that does not apply to the new SCR.

1. On the System Change Request window, select the SCR you wish to duplicate from the **SCR** drop-down list.
2. Select **Duplicate** from the **File** menu.

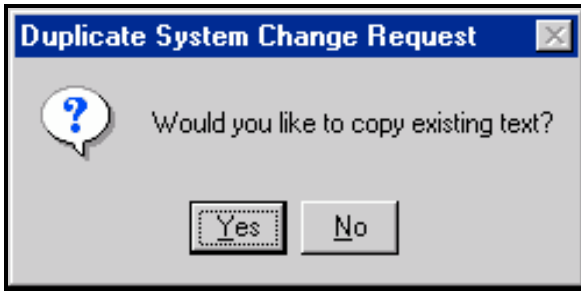


A message will ask if you wish to duplicate the SCR outside of the current AIS.



3. Select the **No** button since you are duplicating an SCR within the same AIS.

Another message will ask if you wish to copy existing text.



4. Select **Yes** to allow CMIS to copy the existing text of the technical analysis, functional analysis, and requirements definition from the original SCR.

The Duplicate System Change Request window opens at the **Configuration** tab. The **SCR** field will be empty. The **Title** defaults to the title of SCR being duplicated. You can modify the description if you wish.

You can modify the default values on the **Configuration**, **Status**, and **Customer** tabs.

Tip For duplicated SCR's, the **Staff Hours** and **Estimated Cost** values will always be **0** (zero). These values are related to CCO's which are not duplicated.

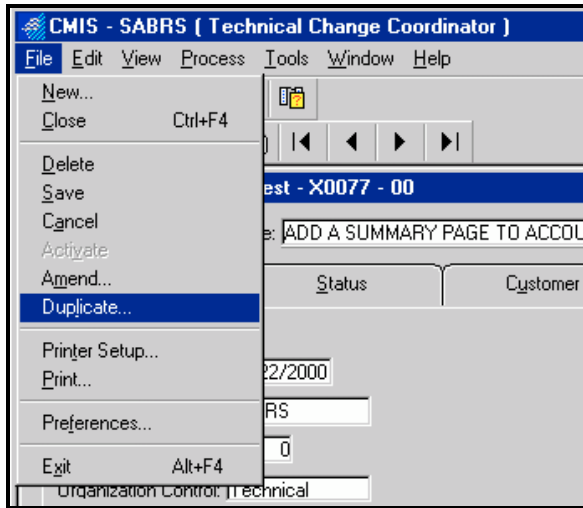
5. Select the **Requirements** tab. Modify this text if necessary.
6. Select the **Save** button.

The Duplicate System Change Request window closes, and CMIS assigns the next sequential SCR number to the new SCR.

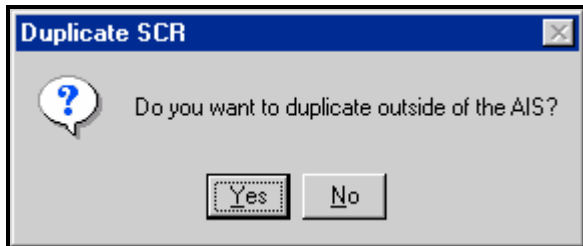
■ **Steps for Duplicating an Existing SCR Outside the Current AIS**

User types CMIS Administrator, CM, Change Coordinator, and AM-Change Coordinator (AM-CC) can copy an SCR to another AIS. An SCR that is a child or that has been canceled or certified cannot be copied. The destination AIS must be in the same production AIS as the original SCR's.

7. On the System Change Request window, select the SCR you wish to duplicate from the **SCR** drop-down list.
8. Select **Duplicate** from the **File** menu.

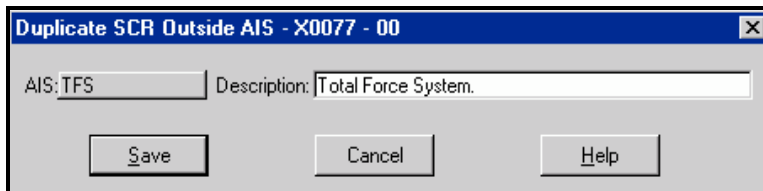


A message asks if you wish to duplicate the SCR outside of the current AIS.



9. Select the **Yes** button.

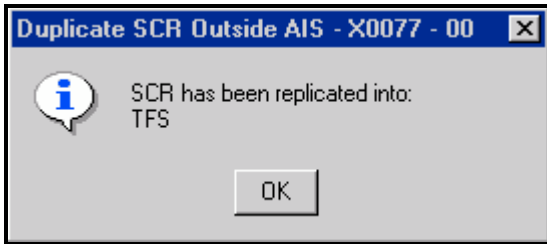
The Duplicate SCR Outside AIS window opens.



10. Choose the desired AIS from the **AIS** drop-down list.
11. Enter a short description in the **Description** field.
12. Select the **Save** button.

F
i

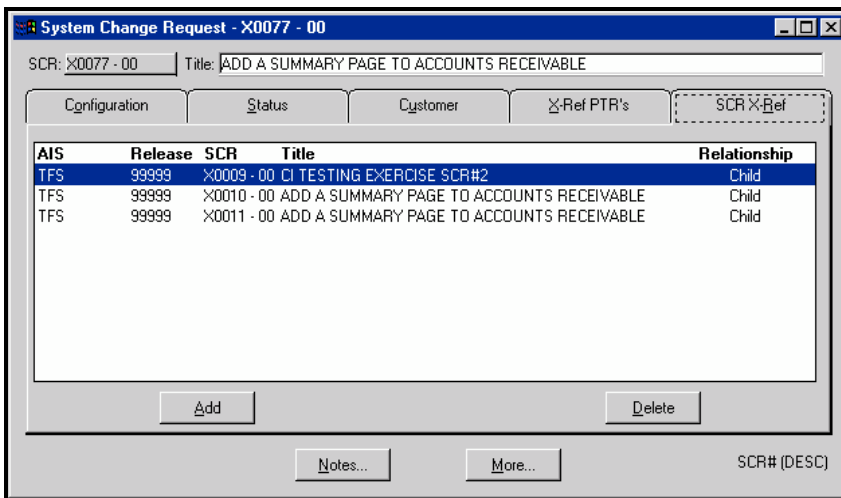
A message will confirm the SCR has been replicated in the other AIS.



■ Steps for Creating an SCR Relationship

Authorized users can establish relationships or dependencies between SCR's of different AIS's.

1. From the System Change Request window **SCR** drop-down list, select the SCR for which you are creating a relationship.
2. Select the **SCR X-Ref** tab.



3. Select the **Add** button.

The Add SCR Relationship window opens.

SCR	Title
X0001 - 00	CALCULATING ERROR PERCENTAGES INCONSISTENTLY IN PAYROL
X0002 - 00	MASS UPDATE NOT DONE - FIRST PASS COMPLETE
X0003 - 00	CALCULATING ERROR PERCENTAGES INCONSISTENTLY IN MONTHL
X0004 - 00	INCORRECT CUSTOMER CODE
X0005 - 00	FILE TRANSFER SOC9
X0006 - 00	DUPLICATE OF FILE TRANSFER ERROR
X0007 - 00	CONFISCATION EXERCISE
X0008 - 00	EC0010 ABENDED WITH SOC7-W/SH

The Add SCR Relationship window **AIS** drop-down list includes only AIS's to which the current user has access as a user type CMIS Administrator, CM, AM, Change Coordinator, or AM-CC.

4. Select the desired AIS from the **AIS** drop-down list.
5. Select the desired SCR from the **SCR** list.
6. Select the **Save** button

The Add SCR Relationship window closes, and the new relationship appears on the **SCR X-Ref** tab.

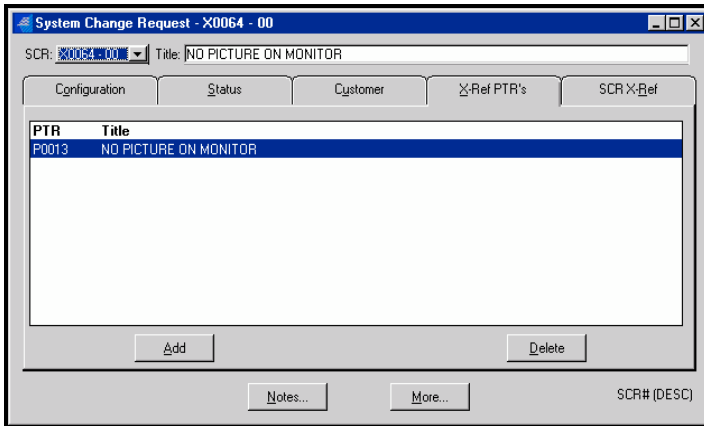
AIS	Release	SCR	Title	Relationship
TFS	99999	X0008 - 00	EC0010 ABENDED WITH SOC7-W/SH	Child
TFS	99999	X0009 - 00	CI TESTING EXERCISE SCR#2	Child
TFS	99999	X0010 - 00	ADD A SUMMARY PAGE TO ACCOUNTS RECEIVABLE	Child
TFS	99999	X0011 - 00	ADD A SUMMARY PAGE TO ACCOUNTS RECEIVABLE	Child

To break an SCR relationship, you must delete it. Select the desired relationship, then select the **Delete** button.

■ Steps for Creating a PTR Cross-Reference

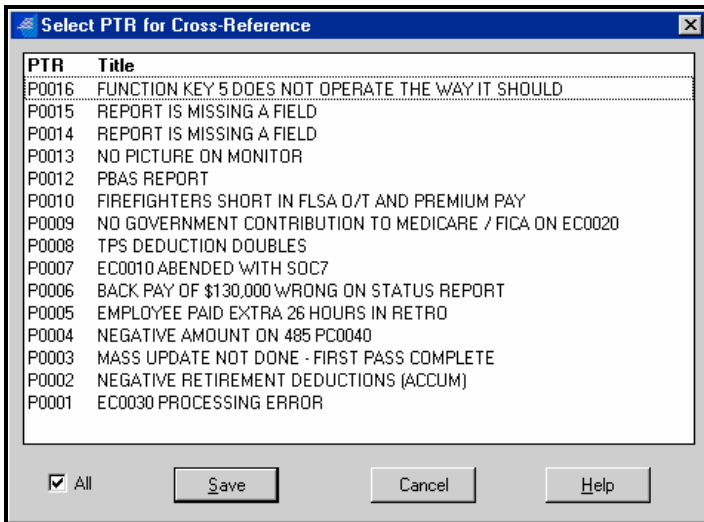
Authorized users can create and delete relationships between SCR's and PTR's and view PTR's that have an SCR cross-reference.

7. From the System Change Request window **SCR** drop-down list, select the SCR you wish to cross-reference to a PTR.
8. Select the **X-Ref PTR's** tab.



9. Select the **Add** button.

The Select PTR for Cross-Reference window opens.



10. Select the desired PTR.
11. To create cross-references for all listed PTR's and the selected SCR, enable the **All** check box.
12. Select the **Save** button.

You can delete an SCR-PTR cross-reference by selecting the cross-reference you wish to delete, then selecting the **Delete** button.

■ Steps for Creating/Modifying SCR Approval

Access to create, modify, and delete SCR approvals depends on the user's security classification, user type, the organization type of the user who created the approval item, and the status of the SCR.

Depending on the approval type, Change Coordinators and AM-CC's can modify the SCR approval information if a user within their organization created the SCR, the approval information has not been approved or rejected, and the user's security classification allows access to modify SCR's. User type CM can always modify the approval item. A user cannot modify the approval item if the SCR has an **Approved Locked** or **Completed Certified** status.

1. Select the System Change Request window **More** button.

The System Change Request Part Two window opens.

2. Select the **Approvals** tab.

Type	Sent Date	Complete Date	Seq	Notes	From	Approved/Rejected	Rejection Reason
Requirements Analysis	06/01/2000	06/05/2000	00	N	N	Rejected	

☒ View All

Buttons: Add..., Configure..., Delete, Print, Notes, Save, Cancel, Help

3. Select the **Add** button.

The Add/Configure SCR Approval window opens.

4. Select the desired approval type from the **Type** drop-down list.
5. In the **Sent Date** enter the date the approval was forwarded. This value defaults to the current date.
6. In the **Complete Date** field, enter the date the approval was completed. The **Complete Date** must be later than the **Sent Date**.
7. From the **Approved/Rejected** drop-down list, select the desired value.
8. If you selected **Rejected** in the previous step, select the desired value from the **Rejection Reasons** drop-down list.
9. The **Routed To** value indicates the user ID of the user responsible for the approval item. Select the desired value from the drop-down list.
10. Enter any desired comments in the text field provided.
11. Select the **Save** button.

The Add/Configure SCR Approval window closes, and the new approval appears on the **Approvals** tab.

You can modify an existing SCR approval by selecting the desired approval, then selecting the **Configure** button. The Add/Configure SCR Approval window will open, allowing you to modify the desired approval information. Select the **Save** button to save your changes.

To delete an approval, select the desired approval and select the **Delete** button.

■ Steps for Creating/Modifying SCR Notes

SCR Notes are useful for internal coordination and information sharing but are not an authoritative source for expanding, limiting, or amending the associated SCR. Users with the appropriate security class settings can create, modify, and delete SCR notes if the TCC

has created at least one note category via the AIS Maintenance window. If the SCR status is **Completed Certified**, you can view but not modify SCR notes.

1. Select the System Change Request window **Notes** button.

The Notes for System Change Request window opens.

2. Select the **Add** button.

The Add/Configure SCR Note window opens.

The **Date/Time** defaults to the current date and time. The **Author** and **Activity** fields default to the current user's values.

3. Select the desired category from the **Category** drop-down list.

Category: Accounting

- Accounting
- Cost Accounting
- Database

4. Select the desired value from the **Restricted to** drop-down list. This value determines the note's level of visibility to other users.
5. Enter a short description of the note in the **Subject** field.
6. Enter the note in the text field provided.
7. To print a copy of the new note, select the **Print** button.
8. Select the **Save** button.

The Add/Configure SCR Note window closes, and the new note appears in the Notes for System Change Request window.

Date/Time	Author	Activity	Category	Restriction	Subject
06/02/2000 08:44	TECH 01	Technical	Accounting	Unrestricted	Accounts Receivable Manipulation

Filter:

☐ Author

☐ Category

Date:

☐ Single On

☐ From/To From

☒ None To

View: ☒ Summary ☐ Details

Buttons: Cancel, Add, Configure, Delete, Print, Help

You can filter the list of SCR notes using the **Author** and **Category** check boxes. To change the detail level of the notes list, select the desired radio button: **Summary** or **Details**.

To modify an SCR note, select the desired note and select the **Configure** button. The Add/Configure SCR Note window opens, allowing you to modify the desired information. Select the **Save** button to save your changes. If you wish to delete an SCR note, select the desired note from the Notes for System Change Request window list, then select the **Delete** button.

When you're finished working with SCR note categories, select the **Cancel** button to close the Notes for System Change Request window.

■ Steps for Entering a CCB Disposition

The System Change Request Part Two window **CCB Disposition** tab allows authorized users to enter a description of the CCB's decision on the SCR. Access to modify the CCB disposition depends on your organization type, user type, and the status of the SCR. User type CM can modify the CCB disposition unless the SCR is in a locked or certified release. The TCC can modify the CCB disposition after the SCR has been forwarded to the TCC. Users who have an open requirements review approval routing can modify the CCB disposition. The CMIS Administrator can modify the **CCB Disposition** text at any time.

1. Select the System Change Request window **More** button.

The System Change Request Part Two window opens.

2. Select the **CCB Disposition** tab.

The screenshot shows a window titled "System Change Request Part Two - X0071 - 00". Below the title bar, there is a text field for "SCR: X0071 - 00" and a "Title:" field containing "EXPAND ESTIMATED COST FIELD". A tabbed interface is visible with tabs for "Requirements Definition", "Functional Analysis", "Technical Analysis", "CCB Disposition" (which is selected and highlighted with a dashed border), "Attachments", "Configuration Change Orders", and "Approvals". The main text area contains the text: "The CCB decided that this SCR will not be implemented at this time. The SCR does not meet the criticality threshold established for this Release." At the bottom of the window, there are buttons for "Export", "Import", "Notes", "Save", "Cancel", and "Help".

3. Enter the desired description in the text field.
4. Select the **Save** button.

■ Steps for Entering Technical/Functional Analysis

Authorized users enter a detailed description of the system change on the System Change Request Part Two window **Technical Analysis** tab and a functional description of the system change on the **Functional Analysis** tab. Employees and AM's can enter a functional or technical analysis when the SCR is created. After creation of the SCR, users cannot enter a technical or functional analysis unless the TCC or FCC forwards the SCR specifically for that purpose. User type CM can modify either the technical or functional analysis, regardless of organization type or SCR status.

In the following steps, assume the TCC forwarded an SCR to you for technical analysis. As the Tech AM, you could forward the SCR to one of your Employees or Sub Action Managers to complete the analysis but in this example, you are going to do the work yourself.

Tip A technical or functional Employee can perform either a technical or functional analysis. A Technical Employee can do a functional analysis, and a Functional Employee can provide a technical analysis. At the Employee level, the difference between technical and functional is in name only.

1. On the System Change Request window, select the desired SCR from the **SCR** drop-down list.
2. Select the **More** button.

The System Change Request Part Two window opens.

3. Select the **Technical Analysis** tab.

4. Enter the desired technical analysis text. If you have a text file containing the analysis text, you can import the text by selecting the **Import** button. You also can export the analysis text to an external text file by selecting the **Export** button.
5. Select the **Save** button.

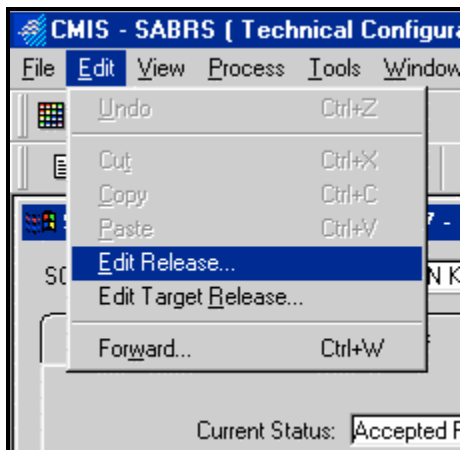
The steps for entering a technical analysis or a functional analysis are similar. Of course, the functional analysis text is entered in the text area of the **Functional Analysis** tab.

■ Steps for Changing an SCR's Release Number/Target Release Number

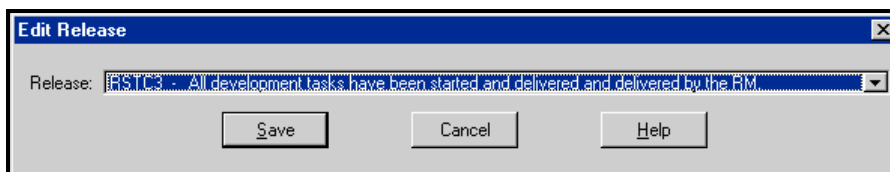
When a user creates an SCR, its status defaults to **Pending**. CMIS automatically assigns the SCR to release number **99999**, the release for all pending SCR's. When the SCR is ready to move into a development release, the appropriate user can either change the SCR's release number via the **Edit** menu **Edit Release** item or can reassign the SCR via the Release window **SCR Selection** tab. If you wish to move the SCR to a locked release, the SCR's status must be **Accepted Scheduled** or **Approved Locked**. If the AIS Maintenance window **Require Estimated Staff Hours for CCO's** check box is checked, you cannot move the SCR to a locked release unless each CCO in the SCR has estimated staff hours entered. If the CCO's for the SCR are valid, the SCR's status will change to **Approved Locked**. An unlocked SCR is one that is in an unlocked release; a locked SCR is in a locked release.

The System Change Request window **Status** tab contains a **Target Release** field. When a user creates an SCR, this value also defaults to **99999**. Generally, the **Target Release** value is relevant only for SCR amendments. When you amend an SCR, CMIS assumes you want the amendment attached to the same release as the parent SCR and will assign the **Target Release** value for the amendment accordingly. If you wish to change the **Target Release** number, do so via the **Edit** menu **Edit Target Release** item.

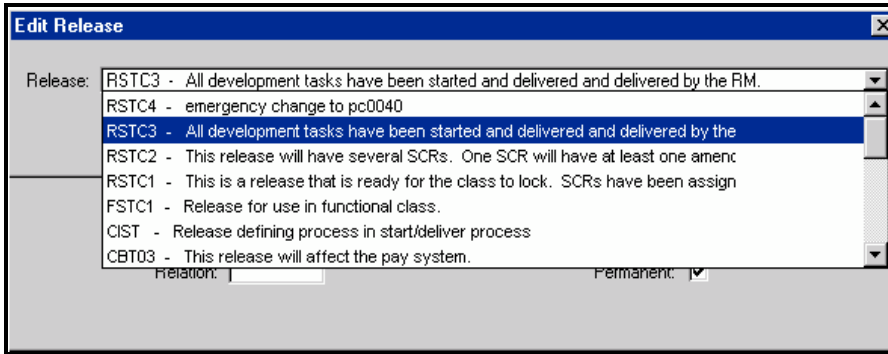
1. On the System Change Request window, select the desired SCR from the **SCR** drop-down list.
2. Select **Edit Release** from the **Edit** menu.



The Edit Release window opens.



- From the **Release** drop-down list select the desired release number for the SCR.



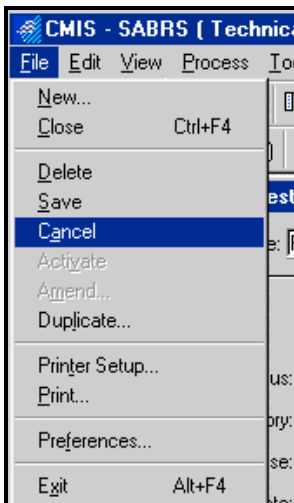
- Select the **Save** button.

Use similar steps to edit the target release, selecting **Edit Target Release** from the **Edit** menu to open the Edit Target Release window. Select the desired release number from the **Target Release** drop-down list, then select the **Save** button to save the change.

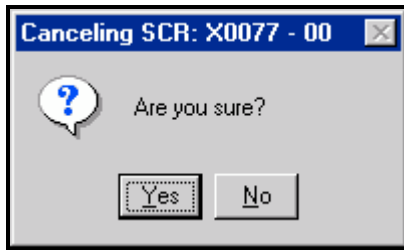
■ Steps for Canceling an SCR

You cannot delete permanent SCR's; instead, you can cancel them. Canceling an SCR does not remove it from the CMIS database but places it in an inactive status. When an SCR is canceled, it is actually assigned to release number **00000**. User types TCC, CM, and CMIS Administrator can cancel permanent SCR's.

- On the System Change Request window, select the desired SCR from the **SCR** drop-down list.
- Select **Cancel** from the **File** menu.



A message appears, prompting you to confirm the SCR cancellation.



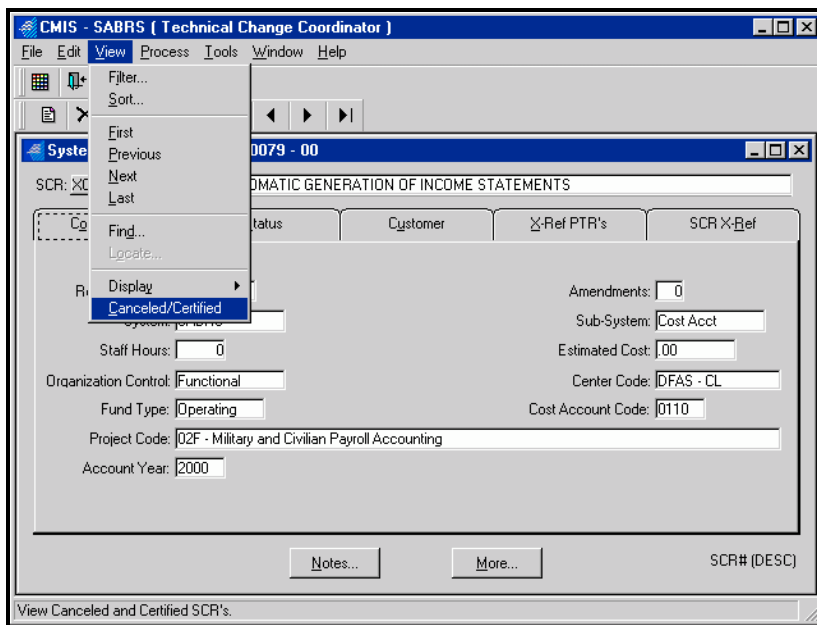
3. If you're sure you want to cancel the SCR, select the **Yes** button to complete the SCR cancellation process.

After you confirm the cancellation, the SCR's status will update to **Canceled**.

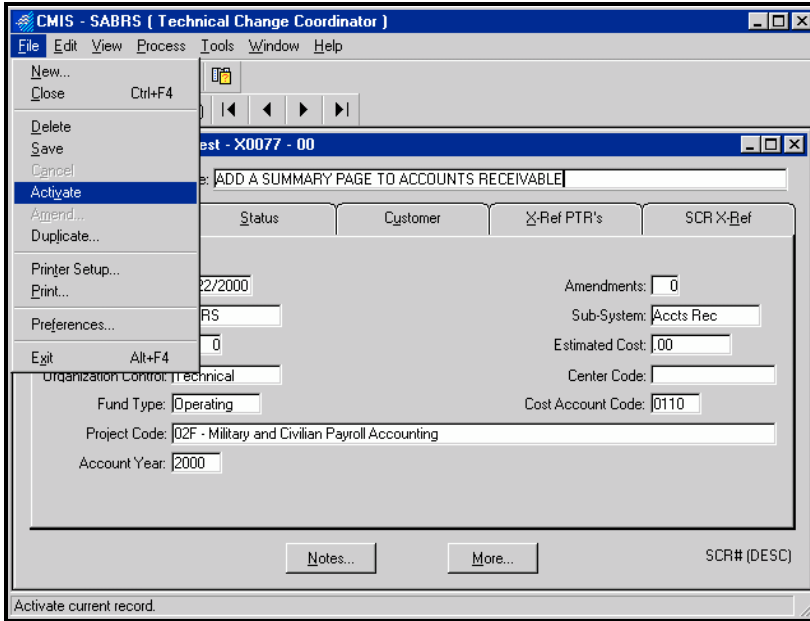
■ Steps for Reactivating a Canceled SCR

Canceled SCR's remain in the CMIS database in an inactive state. When an SCR is reactivated, it is actually assigned to release number **99999**. User types TCC, CM, and CMIS Administrator have access to reactivate canceled SCR's.

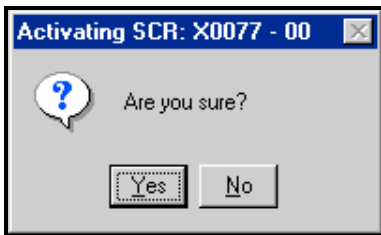
1. From the System Change Request window, select **Canceled/Certified** from the **View** menu to include certified and canceled SCR's in the **SCR** drop-down list.



2. From the **SCR** drop-down list, select the canceled SCR you wish to activate.
3. Select **Activate** from the **File** menu.



A message will appear, asking you to confirm the SCR reactivation.



4. If you're sure you want to reactivate the selected SCR, select the **Yes** button to confirm the reactivation.

■ Steps for Deleting an SCR

The user who created the SCR and that user's AM can delete an SCR if it still has a temporary status.

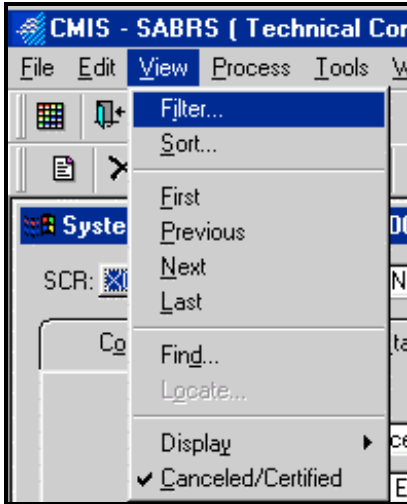
1. On the System Change Request window, select the SCR you wish to delete from the **SCR** drop-down list.
2. Select the **Delete** toolbar button or select **Delete** from the **File** menu.

CMIS will physically remove the SCR from the database.

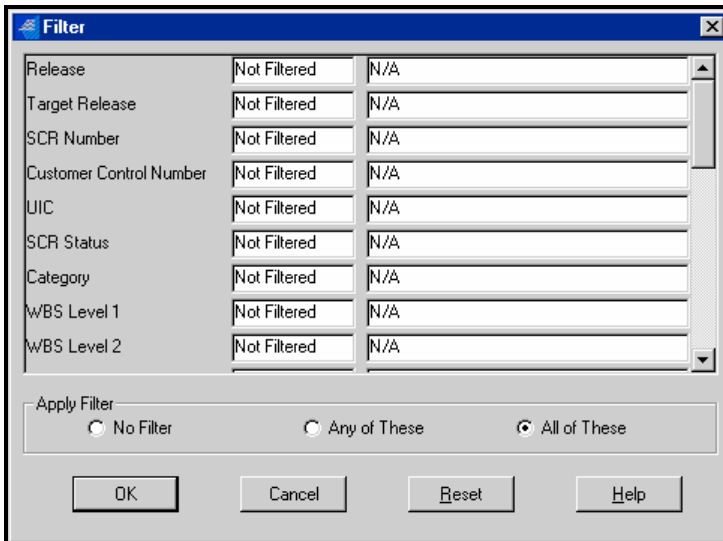
■ Steps for Filtering SCR data

View options allow CMIS users to filter the SCR's that display.

1. From the **System Change Request** window, select **Filter** from the **View** menu.



The Filter Window opens.



2. For each filterable item, you can select the desired operator for the filter. Operators are symbols or words that control how CMIS handles the filter values.
3. For each filterable item, you can enter the desired value to the right of the selected operator.

For example, to filter SCR's so CMIS retrieves only SCR's with release number **99999**, you would select **= Equal** from the **Release** drop-down list, then enter **99999** as the value.

4. After you have defined the desired filters, select the **OK** button.

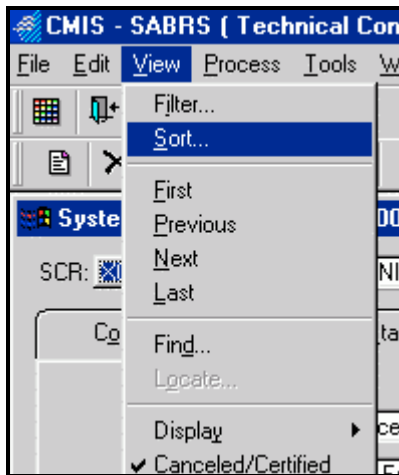
After the Filter window closes, the System Change Request window SCR drop-down list will contain only SCR's that meet your filter condition(s).

NOTE If you have filtered the SCR listing, new SCR's you or other users enter may not display until you revise the filter.

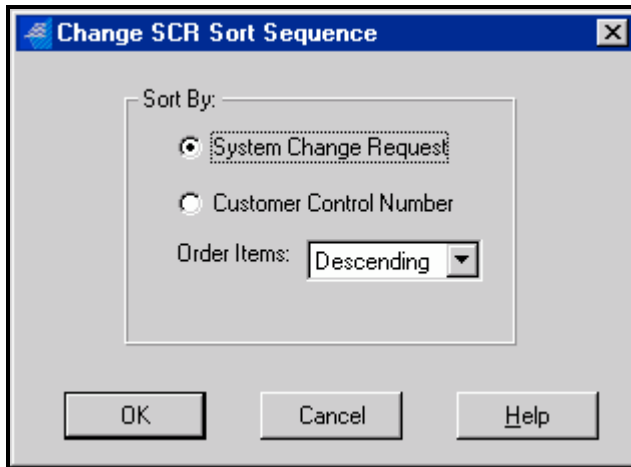
■ Steps for Sorting SCR's

You can control the order in which SCR's are available for selection from the **SCR** drop-down list. By using the sort feature, you can order the SCR list by SCR number or by customer control number, in ascending or descending order.

1. Select the **Sort** option from the **View** menu.



The Change SCR Sort Sequence window opens.



2. In the **Sort By** field select the desired radio button: **System Change Request** or **Customer Control Number**.
3. From the **Order Items** drop-down list, select the desired value: **Descending** or **Ascending** order. Select the **OK** button.

The lower right corner of the System Change Request window displays the sort sequence.

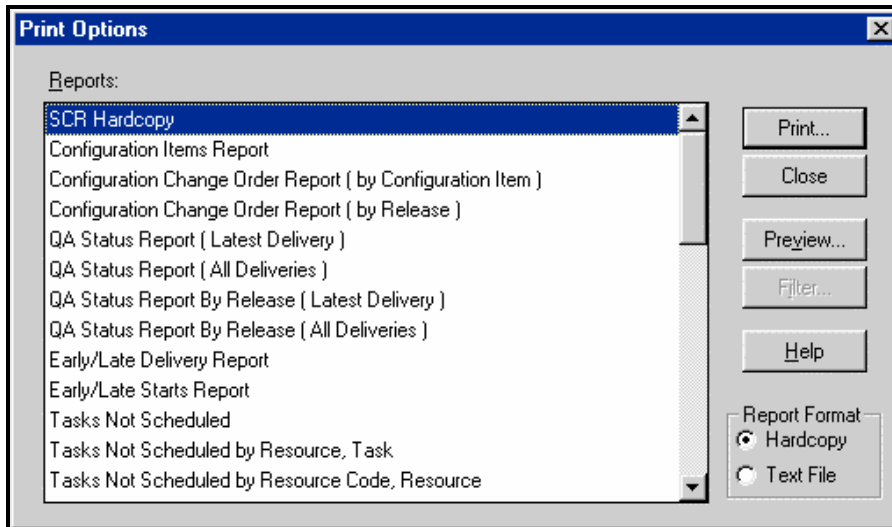


■ Steps for Printing SCR Reports

There are several CMIS SCR reports. You can view the desired report on your monitor, print a hard copy of the report, filter the report, or save the report as a text file.

1. Select the desired SCR from the **SCR** drop-down list.
Select the **Print** toolbar button or select **Print** from the **File** menu.

The Print Options window opens.



2. Select the desired SCR report.

You can view the report on your monitor by selecting the **Preview** button. For some reports, a filter is available. To access the report Filter window, select the **Filter** button. You can save the report as a text file by selecting the **Report Format Text File** radio button, then selecting the **Print** button. If you select **Text File**, the reports listing will change because not all reports are available in text file format.

Tip To obtain a pure ASCII test file, you must first select a generic/text-only printer, then select the **Text File** radio button; otherwise, the text output will contain printer control codes.

3. To print the selected report, select the **Print** button.

Chapter 11 - Release Window



Overview

A release is a package consisting of one or more SCR's (system change requests) which, when implemented, constitutes an updated version of an AIS (automated information system). A release may be a complete and entire distribution of every software entity in source libraries or it may be just a single element of an AIS.

The Release window allows authorized users to create, modify, delete, and maintain releases. With the necessary access you can attach, remove, forward, and rank SCR's for a release. You can specify dependencies for CI's (configuration items) within a release, export and import release data to and from a project management tool, lock and unlock a release, and certify a release.

The Release window is organized into the following tabs.

Configuration Tab

Contains information on the dates, status, and labor hours for the selected release.

SCR Selection Tab

Displays a list of the SCR's attached to the release.

SCR Ranking Tab

Allows users to rank SCR's attached to the selected release in their relative order of importance.

CCO Tab

Allows authorized users to view the configuration change orders (CCO's) for the selected release.

Dependency Tab

Allows authorized users to specify dependencies for CCO's or configuration items (CI's) within a release.

Approval Inquiry Tab

Allows authorized users to view approval information for SCR's attached to the selected release.

Restrictions

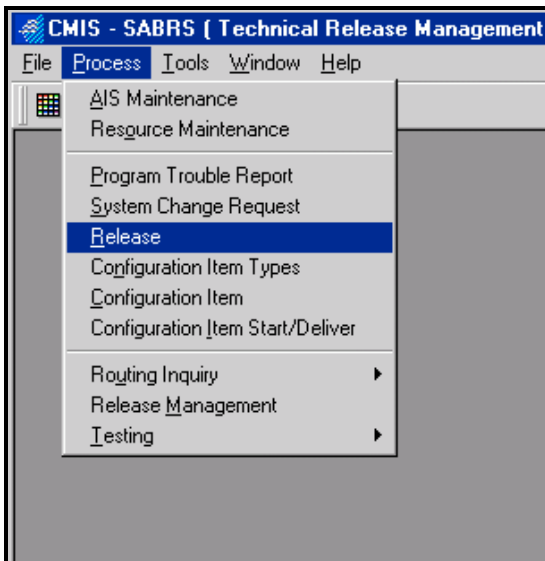
- Access to create, modify, delete, and view releases and release data depends on user type, security class, and the status of the release. User types Higher Authority and Remote User cannot access the Release window.

Release Window Options

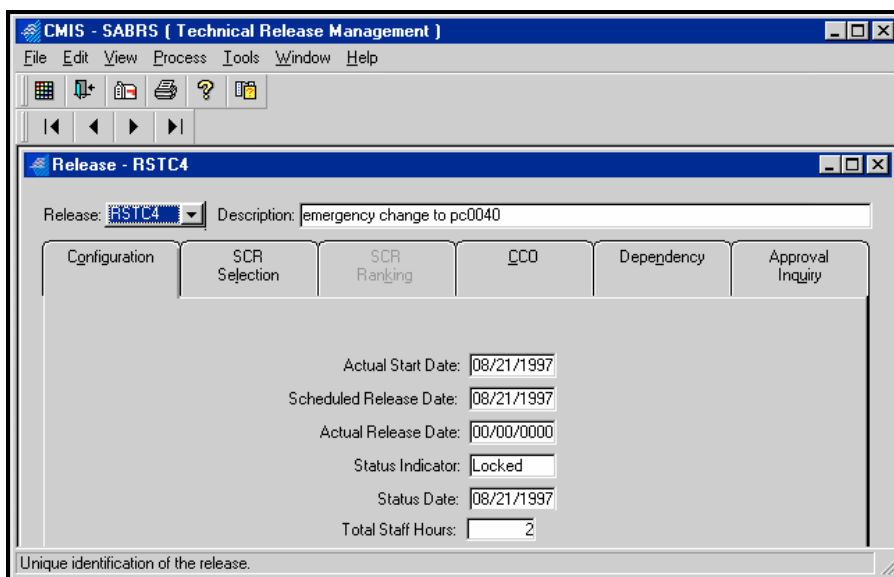
- **Create a New Release**
- **Attach SCR's to a Release**
- **Rank SCR's in a Release**
- **Create a Milestone**

- **Create a Dependency**
- **Export Release Data to a Project Management Tool**
- **Import Release Data from a Project Management Tool**
- **Filter Release Data**
- **Change a Release Number**
- **Lock a Release**
- **Unlock a Release**
- **Create a Release Baseline**
- **Certify a Release**
- **Print Release Reports**

Open the Release window by selecting **Release** from the **Process** menu.



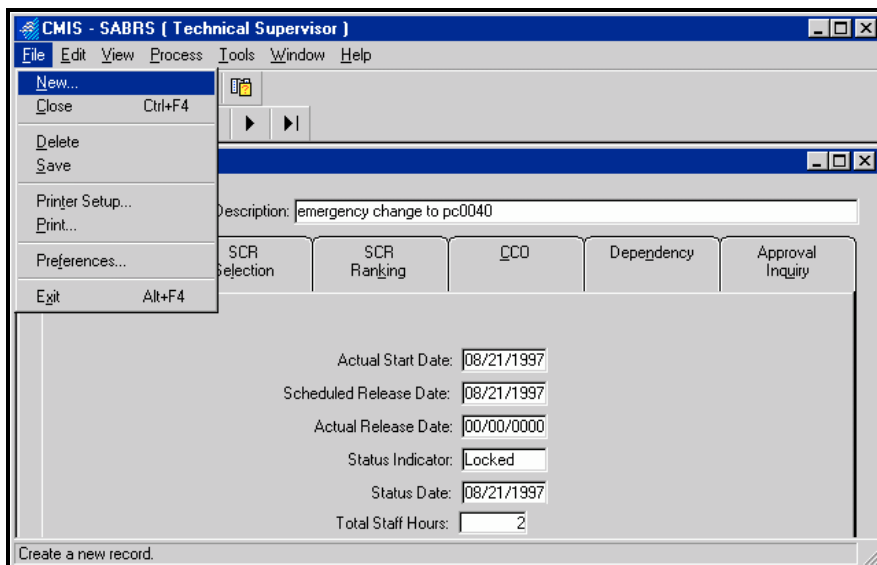
The Release window opens.



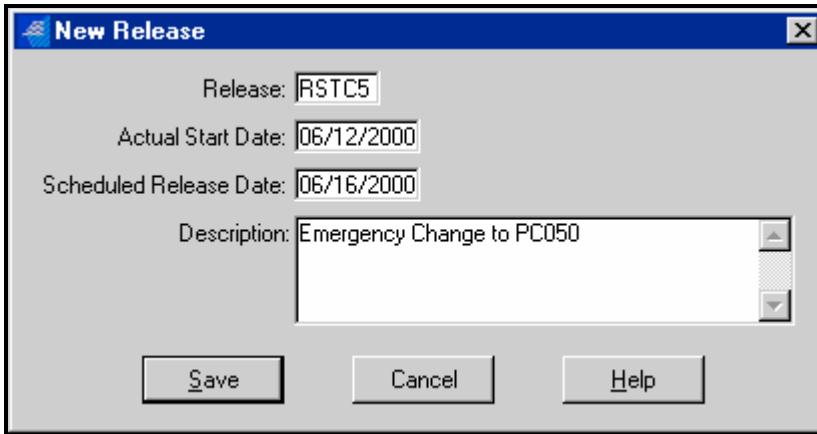
■ Steps for Creating a New Release

User types CMIS Administrator, Configuration Manager (CM), Technical Change Coordinator (TCC), and Technical Action Manager-Change Coordinator (AM-CC) can create new releases.

1. From the Release window, select **New** from the **File** menu or select the **New** toolbar button.



The New Release window opens.



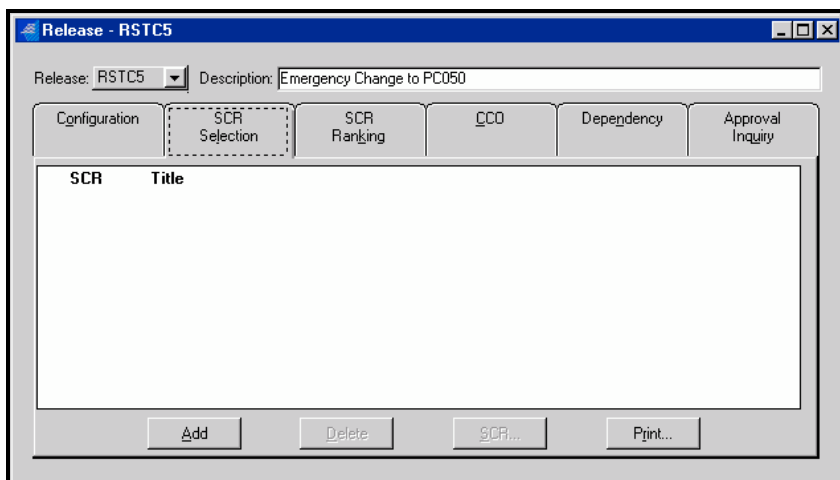
2. Enter a one to twelve character release number in the required **Release** field.
3. Enter the date the work started or will start on the new release in the required **Actual Start Date** field.
4. Enter the date the release is scheduled for distribution in the required **Scheduled Release Date** field. The scheduled release date must be later than the start date.
5. Enter a description of the release in the required **Description** text field.
6. Select the **Save** button to save the new release information.

■ Steps for Attaching SCR's to a Release

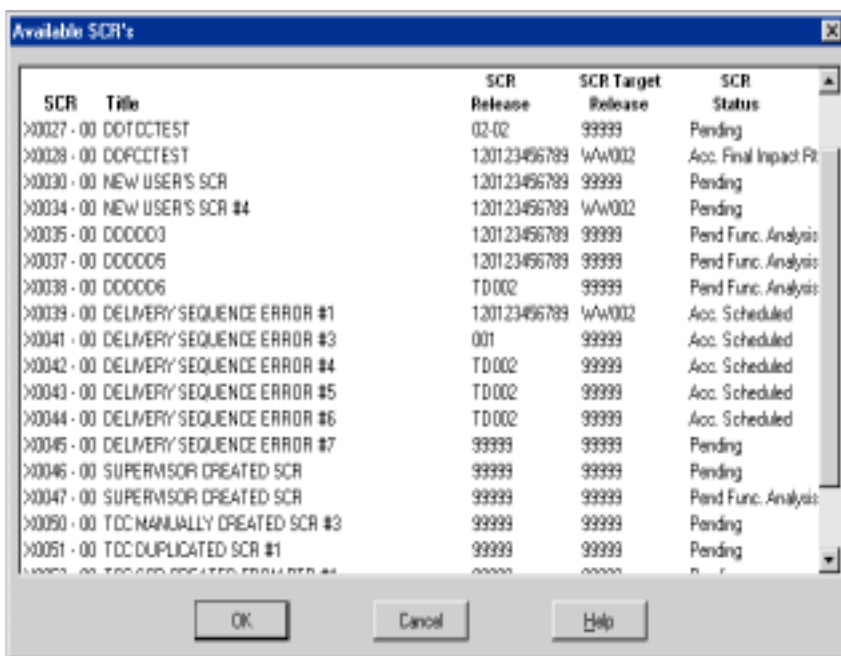
The Release window **SCR Selection** tab lets authorized users assign SCR's to the release. If the release is locked or certified or if the current user does not have access to add SCR's to the release, the **Add** button will not display.

Usually, AIS's are configured to prevent users from amending unlocked SCR's; when you amend an SCR that is assigned to a locked release, the amendment will not automatically be included in the release with the parent SCR. To assign an SCR amendment to a locked release, you must do so from the System Change Request Maintenance window via the **Edit** menu **Edit Release** item.

1. Select the desired release from the **Release** drop-down list.
2. Select the Release window **SCR Selection** tab.

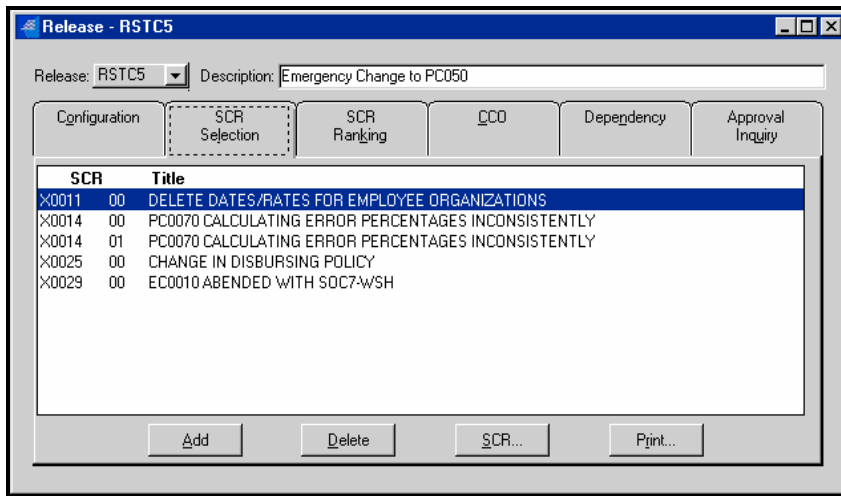


3. Select the **Add** button. The Available SCR's window opens.



4. Click on each SCR you wish to attach to the release. To cancel a selection, click on the selected SCR to unselect it. The information displayed for each SCR includes: Release to which the SCR is currently assigned, the SCR's Target Release, and the SCR's current status.
5. When you have made all desired SCR selections, select the **OK** button.

The Available SCR's window closes and the selected SCR's appear on the **SCR Selection** tab.



SCR	Title
X0011 00	DELETE DATES/RATES FOR EMPLOYEE ORGANIZATIONS
X0014 00	PC0070 CALCULATING ERROR PERCENTAGES INCONSISTENTLY
X0014 01	PC0070 CALCULATING ERROR PERCENTAGES INCONSISTENTLY
X0025 00	CHANGE IN DISBURSING POLICY
X0029 00	EC0010 ABENDED WITH SOC7-WSH

To remove a listed SCR from the release, select the SCR you wish to delete then select the **Delete** button.

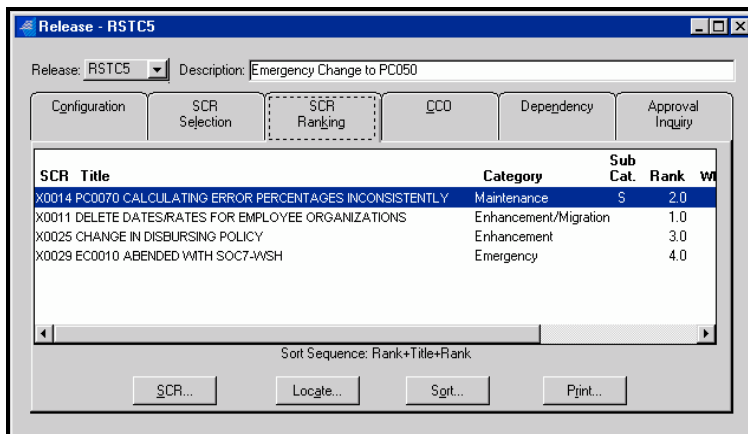
For SCR's with amendments, both the parent SCR and its amendment display.

Steps for Ranking SCR's Within a Release

The **SCR Ranking** tab allows authorized users to rank SCR's attached to the release. The relative importance of the SCR's is user-determined. Usually, funding and time constraints are the main factors in narrowing the list of SCR's assigned to the release. Ranking the SCR's aids the configuration control board (CCB) in determining which SCR's will be included in the locked release. The SCR ranking does not dictate the order for completing the SCR's.

The SCR Ranking tab also features sort options that let you control the order of the listed SCR's. Reordering the listed SCR's does not affect their rankings.

1. Select the desired release from the **Release** drop-down list.
2. Select the Release window **SCR Ranking** tab.



SCR	Title	Category	Sub Cat.	Rank	Wt
X0014	PC0070 CALCULATING ERROR PERCENTAGES INCONSISTENTLY	Maintenance	S	2.0	
X0011	DELETE DATES/RATES FOR EMPLOYEE ORGANIZATIONS	Enhancement/Migration		1.0	
X0025	CHANGE IN DISBURSING POLICY	Enhancement		3.0	
X0029	EC0010 ABENDED WITH SOC7-WSH	Emergency		4.0	

Sort Sequence: Rank+Title+Rank

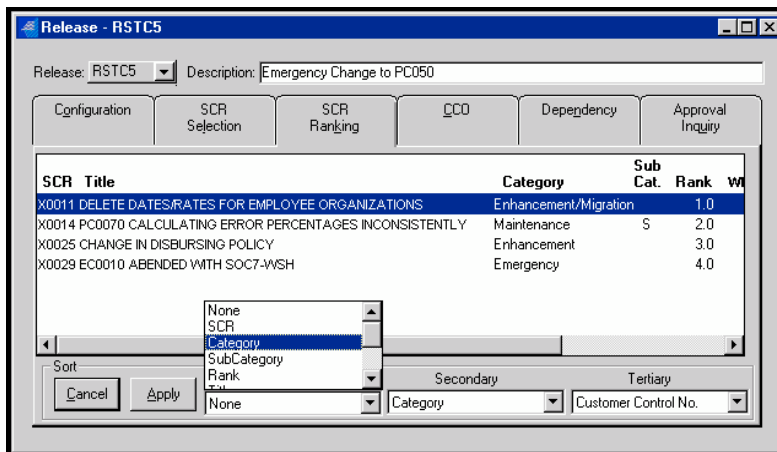
Tip CMIS SCR **Rank** numbers default to **1.0, 2.0, 3.0**, etc. You can use a different numbering scheme to better suit your needs. For example, you could rank SCR's using increments of ten, such as **10, 20, 30**, etc.; however, resequencing will renumber all SCR's using the default numbering sequence.

3. To change SCR **Rank** numbers, click on each desired SCR and enter a new value for the **Rank** number. Don't worry about having two SCR's with the same **Rank** number. CMIS will renumber duplicate numbers for you automatically when you complete the ranking process.
4. After you have changed the desired **Rank** numbers, select **Resequence** from the **Edit** menu.

CMIS will update the SCR rankings based on your changes. If you are not satisfied with the new SCR rankings, you can change the desired **Rank** numbers and select the **Resequence** item from the **Edit** menu until you are satisfied with the SCR rankings.

You can sort the list of SCR's by clicking on an SCR and dragging it to the desired position in the list. You also can use the **Sort** button to reveal additional sort options for the SCR list. Selecting the **Sort** button reveals a **Sort** window area. Use the three drop-down lists to sort the listed SCR's by one to three criticality values.

For example, every SCR has a **Category** value. To sort the listed SCR's using **Category** as the main sort value, you would select **Category** from the **Primary** drop-down list. You can select a value for the **Secondary** and **Tertiary** lists if desired, or select **None** from any of the three lists to have CMIS ignore any of the three sort criteria.



5. Select the desired sort criteria from the drop-down lists, then select the **Apply** button to sort the SCR list by the criteria you have chosen.

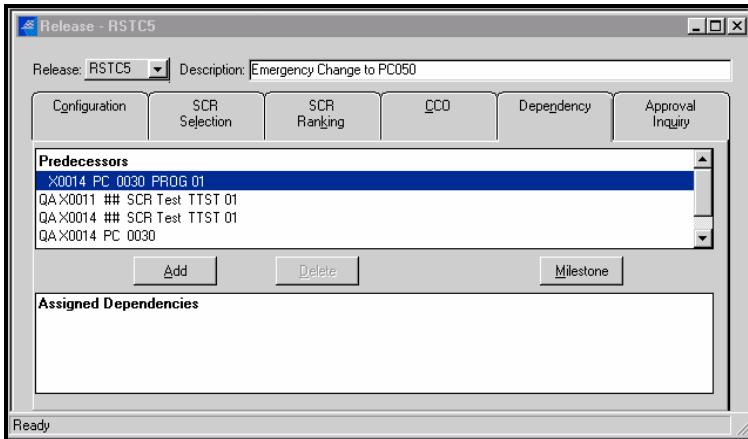
After you select **Apply**, the listed SCR's will reorder and the **Sort** window area will disappear from view. To reaccess the **Sort** options, simply select the **Sort** button again.

■ Steps for Creating a Milestone

Users create milestones to define the order in which tasks must be performed to complete a

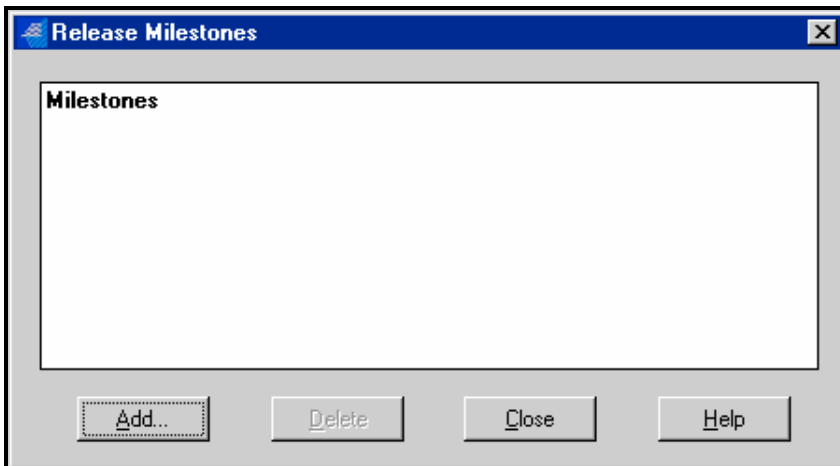
release. Usually, milestones are used in the project management tool. A milestone identifies a starting point for a task or group of tasks and serves as a predecessor to those tasks.

1. Select the desired release from the **Release** drop-down list.
2. Select the Release window **Dependency** tab.



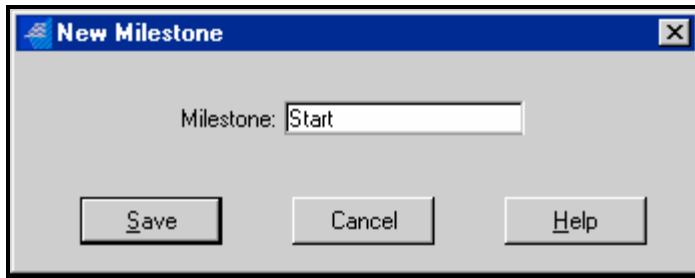
3. Select the **Milestone** button.

The Release Milestones window opens.



4. Select the **Add** button.

The New Milestone window opens.



5. Enter a name for the new milestone in the **Milestone** field.
6. Select the **Save** button.

The new milestone appears in the Release Milestones window list.

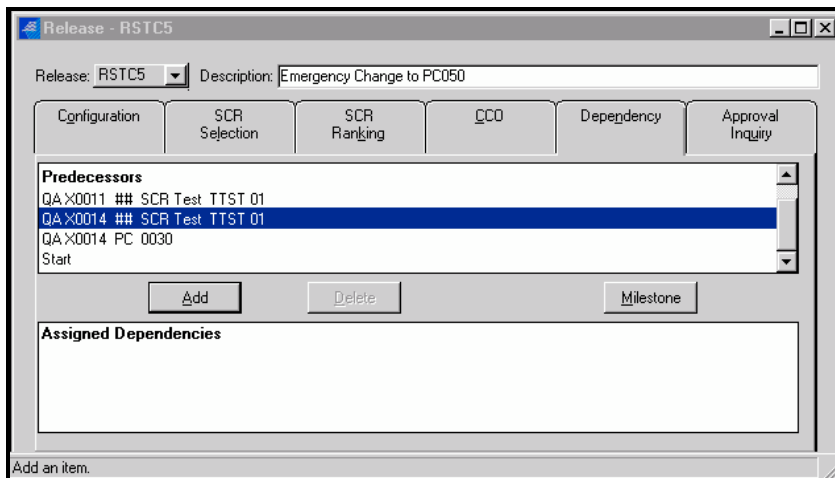
7. Select the **Close** button on the Release Milestones window.

The new milestone appears on the **Dependency** tab **Predecessors** list.

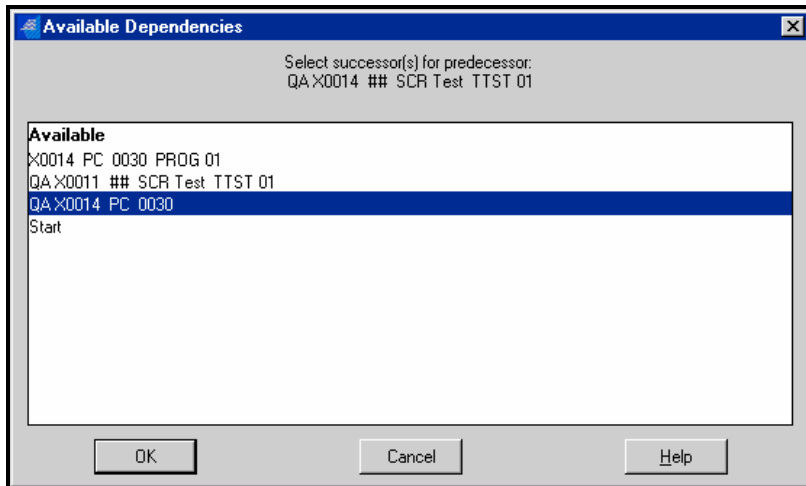
■ Steps for Creating a Dependency

A dependency is a relationship between two tasks that defines the order in which the tasks must be performed. Usually, dependencies are used in the project management tool. Users can specify dependencies for CCO's and milestones within a release.

1. Select the desired release from the **Release** drop-down list.
2. Select the Release window **Dependency** tab.
3. Select the desired predecessor from the **Predecessor** list. The list of predecessors includes release CCO's and milestones.

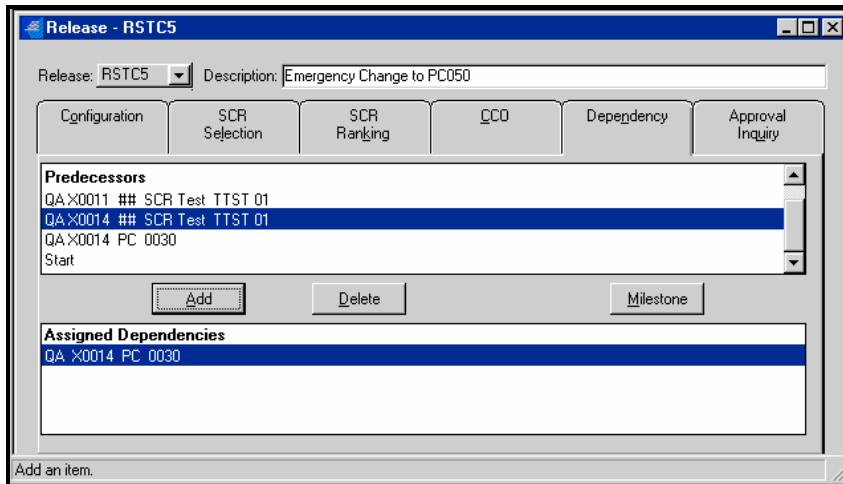


The Available Dependencies window opens.



4. Select the desired dependency.
5. Select the **OK** button.

The Available Dependencies window closes and the new dependency appears in the **Dependency** tab **Assigned Dependencies** list.



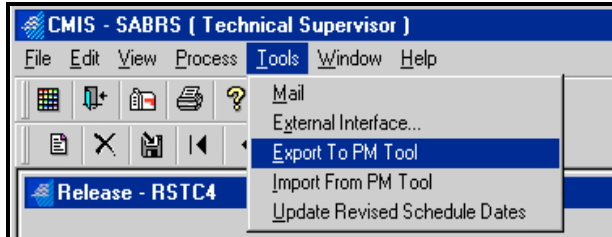
In this example, the created dependency requires completion of CCO **QA X0014 ## SCR Test** before CCO **QA X0014 PC 0030** can be started.

■ Steps for Exporting Release Data to a Project Management Tool

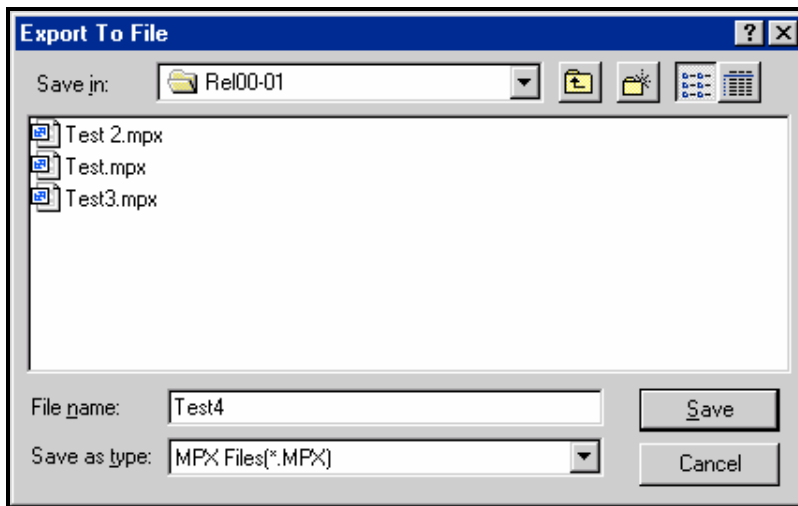
The export option allows authorized users to export a release to Microsoft ® Project, a project management (PM) software application. If a functional user exports release data to a PM tool, CMIS will export functional CCO's only. For technical users exporting release data, CMIS will export both functional and technical CCO's. When a user exports a release to a PM tool, CMIS creates a file with an **MPX** extension that contains the following release data: milestones, all user ID's with access to the current AIS, dependencies, and resource

unavailability dates. After a successful export, you can access this file in Microsoft ® Project to create a schedule for the release.

1. Select the desired release from the **Release** drop-down list.
2. From the Release window, select **Export to PM Tool** from the **Tools** menu.



The Export to File window opens.

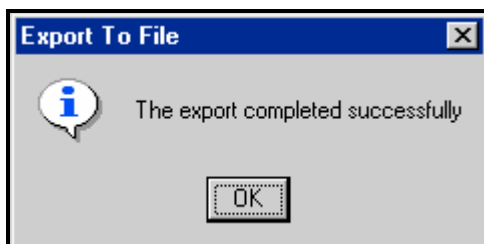


3. From the **Save in** drop-down list, select the folder name where the exported file will be stored. Select the folder icon if you wish to search for the desired folder name.
4. Enter a file name in the **File Name** field.

CMIS will automatically assign the file an **MPX** extension. The MPX file extension is a record-based, text file format used to transfer files between Microsoft ® Project and other applications that support the MPX file format.

5. Select the **Save** button to export the release.

A message will appear, indicating whether the export was successful.



After a successful export, you can open the exported file in Microsoft ® Project to create or update a schedule for the release. After making any desired changes to the file, you can use the **Import From PM Tool** process to import selected data into CMIS.

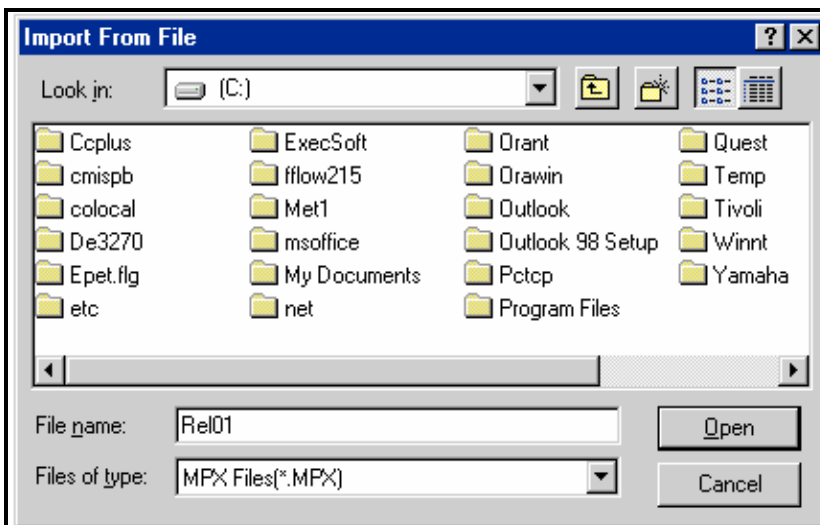
■ Steps for Importing Release Data from a Project Management Tool

The import option allows users to import a release *.MPX file from Microsoft ® Project. Only user types CMIS Administrator, CM, TCC, and Technical AM-CC can perform this import action.

1. From the Release window, select **Import From PM Tool** from the **Tools** menu.



The Import From File window opens.



2. From the **Look in** drop-down list, select the drive and folder where the *.MPX file resides.
3. After you locate the desired folder, select the file name from the list, or enter the file name in the **File Name** field
4. Select the **Open** button.

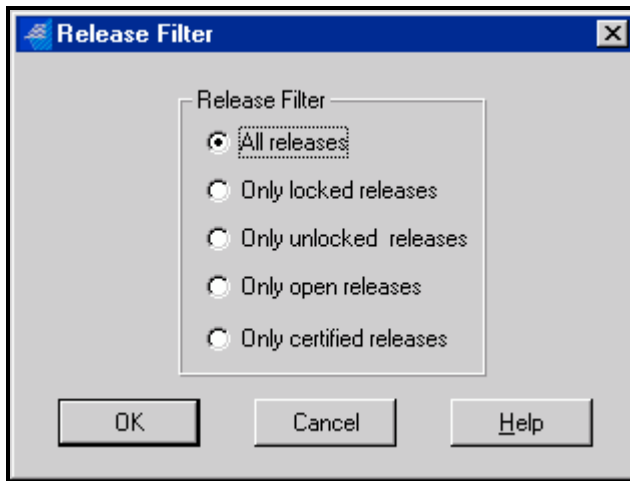
If you used Project to create or update a release schedule, the import action will provide schedule dates for an unlocked release and revised scheduled dates for a locked release. If the imported file contains errors, an error report will display.

■ Steps for Filtering Release Data

The Filter window allows you to access all releases or releases with a specified status.

1. From the Release window, select **Filter** from the **View** menu.

The Release Filter window opens.



F
i

2. Select the desired filter.
3. Select the **OK** button.

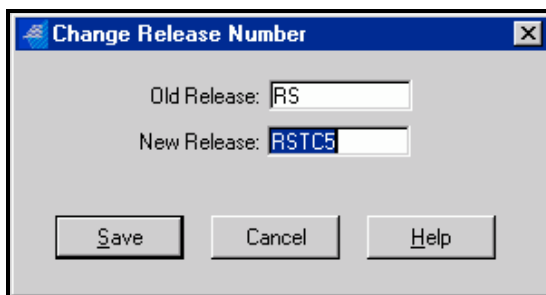
The Release Filter window closes, and the **Release** drop-down list will only include releases that match your selected release filter.

■ Steps for Changing a Release Number

User types TCC's, CM, and CMIS Administrators have access to change release numbers on unlocked releases only. Release numbers **00000** and **99999** are reserved for use by CMIS and cannot be changed.

1. From the Release window, select **Change Release Number** from the **Edit** menu.

The Change Release Number window opens.



2. Enter the new five-character number in the **New Release** field.
3. Select the **Save** button.

■ Steps for Locking a Release

The Lock Release option allows authorized users to bind a release in preparation for beginning work on the release. User types CMIS Administrator, CM, TCC, and Technical Action Manager-Change Coordinator (AM-CC) have access to lock a release.

Locking a release signals that a release is nearing the next stage of the release process, when the responsible resources begin work on the CCO's in the release.

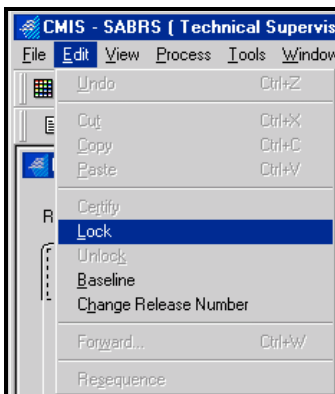
When you lock a release, CMIS takes the following actions:

- Updates the status of each attached SCR to **Approved Locked**.
- Creates an SCR approval item for the release.
- Builds an audit of the release.

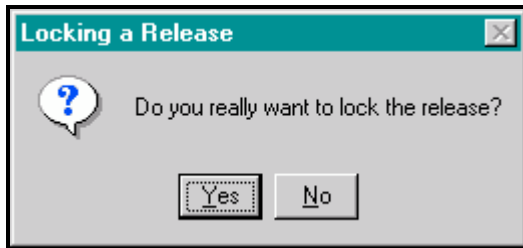
Users cannot lock a release unless the following conditions exist:

- Each SCR attached to the release must be **Accepted Scheduled**.
- Unless the SCR is an amendment with a change or deletion, the SCR's **Staff Hours** value must be greater than **0** (zero).
- If an SCR's **Estimated Cost** value exceeds the AIS **SCR Threshold** amount, the SCR must have Higher Authority approval.
- Each attached SCR must have CCO's.
- Each CCO must contain an **Assign To** value.
- A QA CCO must have a matching development CCO (except for CCO **QA ## SCR Test**).
- If the AIS Maintenance window's **Require Estimated Staff Hours for CCO's** option is enabled, each CCO must have an estimated hours value.

1. Select the desired release from the **Release** drop-down list.
2. Select **Lock** from the **Edit** menu.



A message will ask you to confirm the lock action.



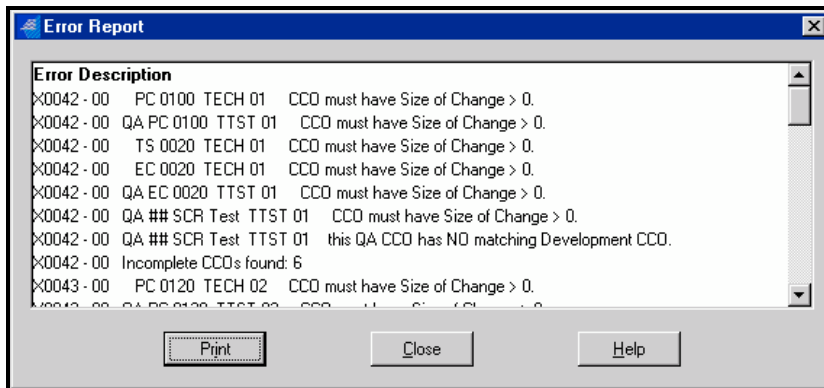
3. Select the **Yes** button if you're sure you want to lock the release.

CMIS will display a confirmation message if the lock action was successful.



After successfully locking the release, the status of the SCR's in the release will change to **Approved Locked**.

If you try to lock a release that does not meet all required conditions, CMIS will generate an error report and the release will not lock.



The error report lists the SCR's and a description of the error. If you wish, you can print the error report by selecting the **Print** button.

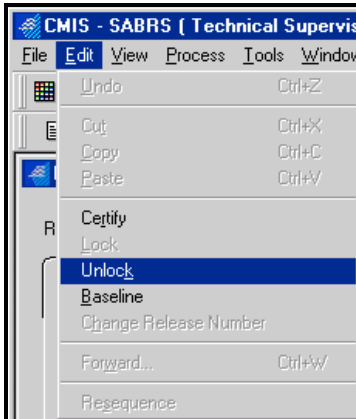
■ Steps for Unlocking a Release

Only user types CMIS Administrator and CM can unlock a release. When you unlock a release, CMIS will update the status of the attached SCR's to **Accepted Scheduled**.

When you unlock a release, CMIS takes the following actions:

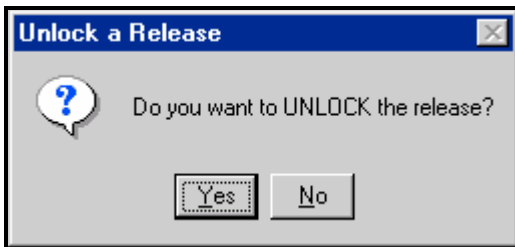
- Creates an SCR approval record and removes any rework CCO's.
- Removes any CI's that could only be started on a locked release.

- Removes any CI testing or delivery information for CI's that are not configured to allow modifications on an unlocked SCR.
 - Removes any test deficiency reports (TDR's) for a CI.
 - Removes any audit information for the selected release.
1. Select the desired release from the **Release** drop-down list.
 2. Select **Unlock** from the **Edit** menu.



A message will ask for confirmation of the unlock action.

NOTE Do not unlock the release unless you are absolutely certain you wish to do so. After you unlock a release, there is no programmatic method of reversing this action.



3. Select the **Yes** button to unlock the release only if you are certain you wish to do so.

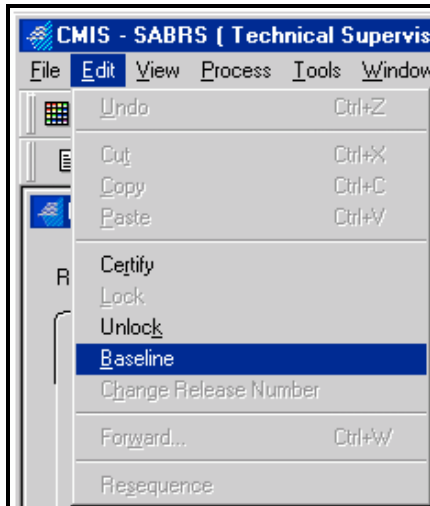
A message confirms the unlock action.



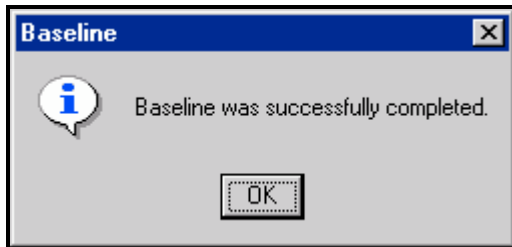
■ Steps for Creating a Release Baseline

After a release is locked, the CMIS Administrator can build a baseline. A release baseline is an audit of the release, including the release number and the number of SCR's attached to the release. Only the CMIS Administrator can baseline a release.

1. Select the desired release from the **Release** drop-down list.
2. Select **Baseline** from the **Edit** menu.



A message will confirm whether the baseline action was successful.



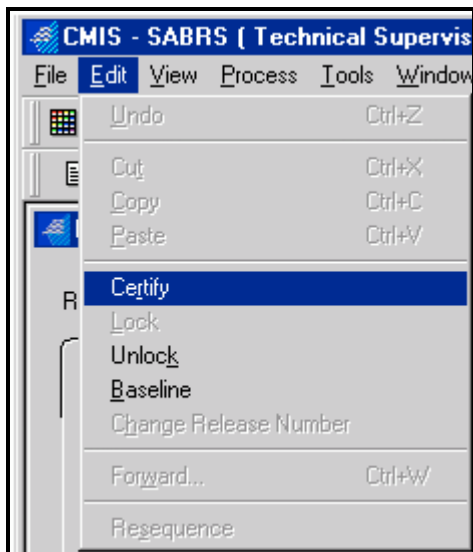
■ Steps for Certifying a Release

User types CMIS Administrator and CM can certify a release in preparation for distribution of the release.

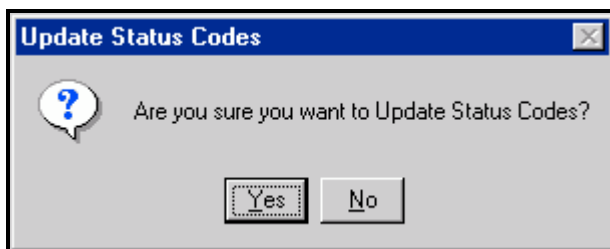
NOTE Do not certify the release unless you are absolutely certain you wish to do so. After a release is certified, only the CM can modify the status of the attached SCR's.

To certify a release, the release must be locked and the release must have SCR's attached to it. In addition, the release cannot have any open CCO's on an unlocked SCR amendment. If the AIS Maintenance window **Require Actual Hours per CI** option is enabled, you cannot certify the release unless at least one CCO per CI in the release has actual hours entered.

1. Select the desired release from the **Release** drop-down list.
2. Select **Certify** from the **Edit** menu.



A message asks for confirmation that you want to update **Status Codes**.



3. If you are sure you want to certify the release, select the **Yes** button.

A message will confirm whether the certification action was successful.



When you certify a release, CMIS performs the following actions:

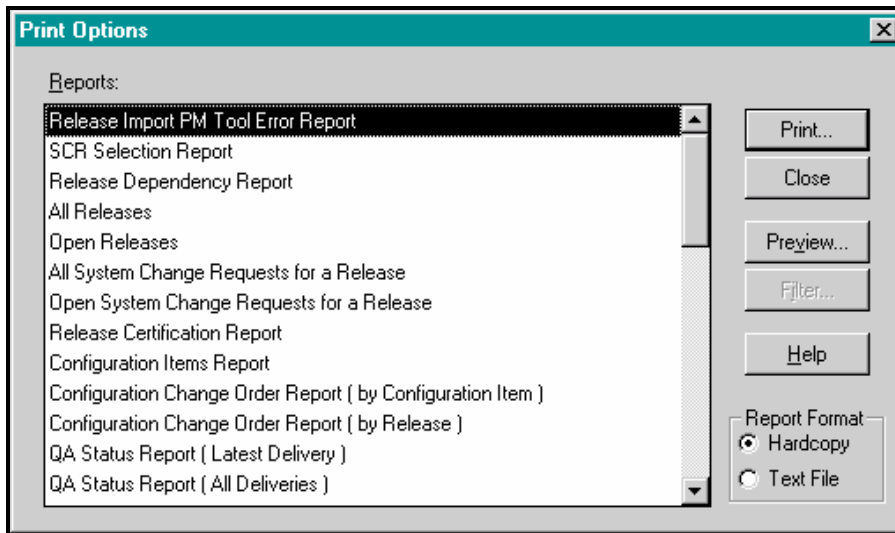
- Updates the release **Status Indicator** to **Certified**.
- Updates the **Actual Release Date** to the current date.
- Creates a **CM Certified** approval item.
- Updates the status of all SCR's in the release to **Completed Certified**.

■ Steps for Printing Release Reports

There are several CMIS release reports. You can view the desired report on your monitor, print a hard copy of the report, filter the report, or save the report as a text file.

1. Select the desired release from the **Release** drop-down list.
2. From the Release window, select the **Print** toolbar button or select **Print** from the **File** menu.

The Print Options window opens.



3. Select the desired release report.

You can view the report on your monitor by selecting the **Preview** button. For some reports, a filter is available. To access the report Filter window, select the **Filter** button. You can save the report as a text file by selecting the **Report Format Text File** radio button, then selecting the **Print** button.

4. To print the selected report, select the **Print** button.

Chapter 11A Release Planning Window



Overview

A planning release provides a means of assembling candidate SCRs for a release without changing the SCRs' current release assignment. The SCRs in the selected planning release may be migrated into the standard release process.

A planning release:

- Can be any release in the AIS which is unlocked with the exception of releases "99999" (pending SCRs) and "00000" (cancelled SCRs).
- Always contains all SCRs and SCR Amendments having a Target Release equal to the planning release.

SCRs are added to a planning release by setting the SCR's Target Release equal to the planning release. This may be done by:

- Using the Release Planning process ADD SCR function.
- Using the SCR Maintenance process Edit Target Release function.

Migration may be accomplished by users have Technical Change Coordinator (or higher) access. Migration accomplishes the following:

- Sets the SCRs' (and all of the SCRs' amendments) Release equal to the planning (Target) release value. This "moves" the SCRs into the release.
- Sets the Target Release of all the SCRs (and all of the SCRs' amendments) in the planning release to "99999". This "removes" the SCRs from the planning release (leaving the planning release empty).

The Release Planning window allows authorized users to create, modify, delete, and maintain releases. With the necessary access you can attach, remove, and forward SCRs for a planning release.

The Release Planning window is organized into the following tabs.

Configuration Tab

Contains information on the scheduled release date and estimated labor hours for the selected planning release.

SCR Selection Tab

Displays a list of the SCR's attached to the planning release.

SCR Ranking Tab

Displays the rank of each SCR in the SCR's current Release. SCRs cannot be ranked within the planning release. The ranking data are displayed for information purposes only. Except for the display only restriction, the SCR Ranking function is identical to that in the standard Release process. See Chapter 11 for details.

CCO Tab

Allows authorized users to view the configuration change orders (CCO's) for the selected planning release. This function is identical to that in the standard Release process. See Chapter 11 for details.

Approval Inquiry Tab

Allows authorized users to view approval information for SCR's attached to the selected release. This function is identical to that in the standard Release process. See Chapter 11 for details.

Restrictions

Access to create, modify, delete, and view releases and release data depends on user type, and security class. User types Higher Authority and Remote User cannot access the Release Planning window. . This function is identical to that in the standard Release process. See Chapter 11 for details.

Standard Release Window Options

The following standard Release process options are available in the Release Planning process. See Chapter 11 for details.

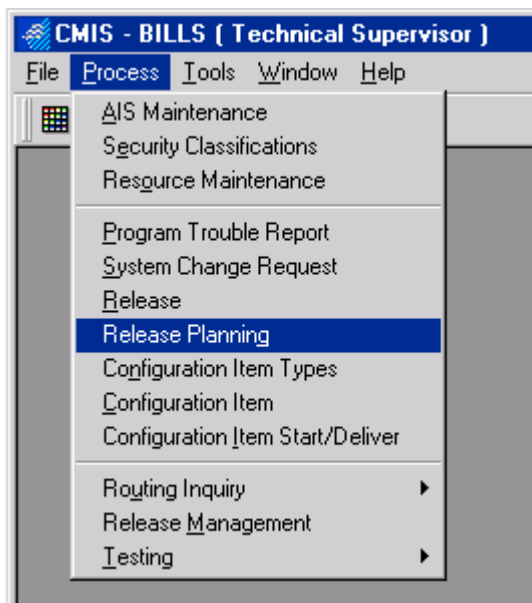
- **Forward SCR or Group of SCRs**
- **Edit Release Number**
- **Create New Release**
- **Print Options**

Release Planning Window Options

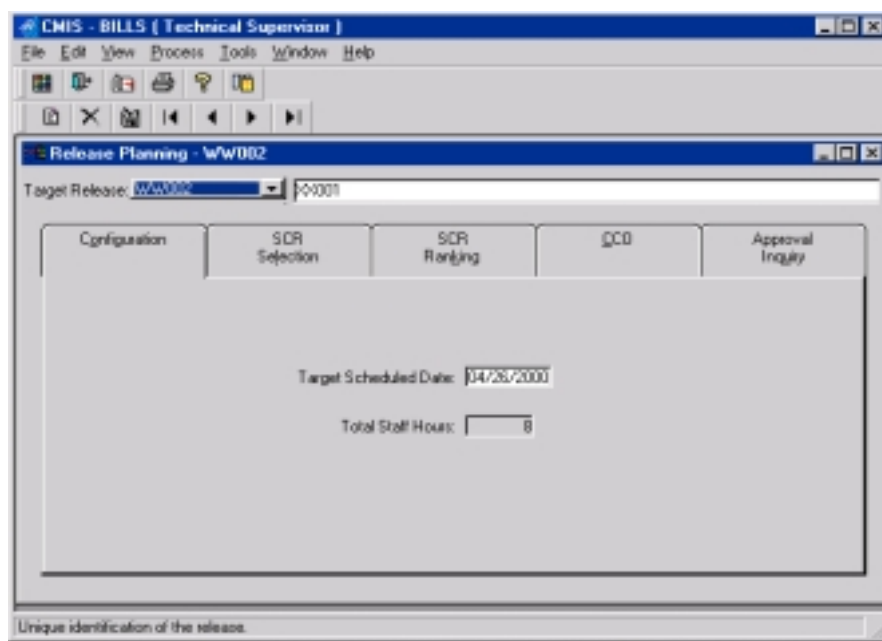
Attach SCRs to a Planning Release

Migrate a Planning Release

Open the Release Planning window by selecting **Release Planning** from the **Process** menu.



The Release Planning window opens.

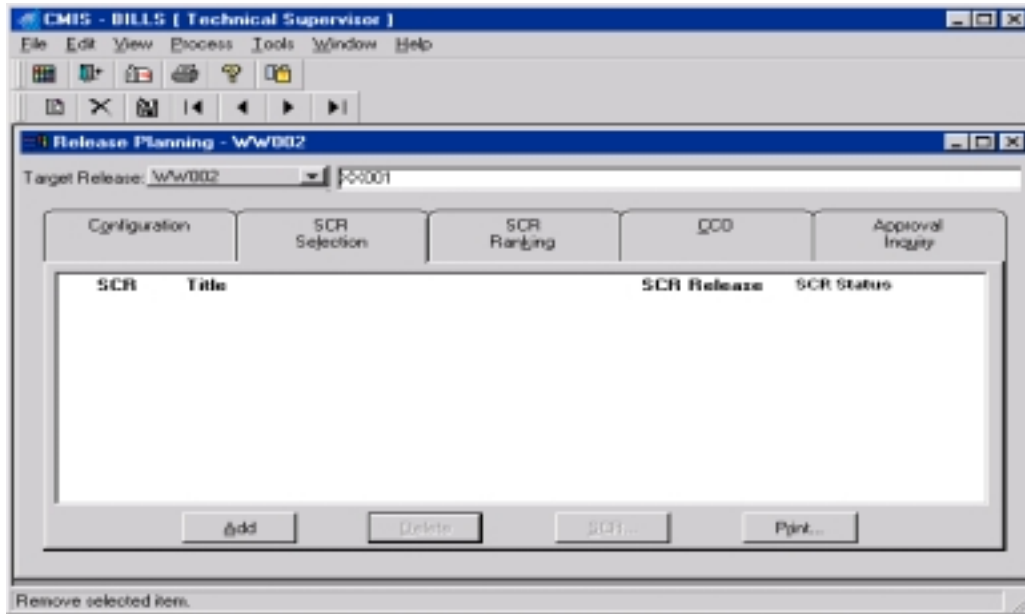


■ Steps for Attaching SCR's to a Planning Release

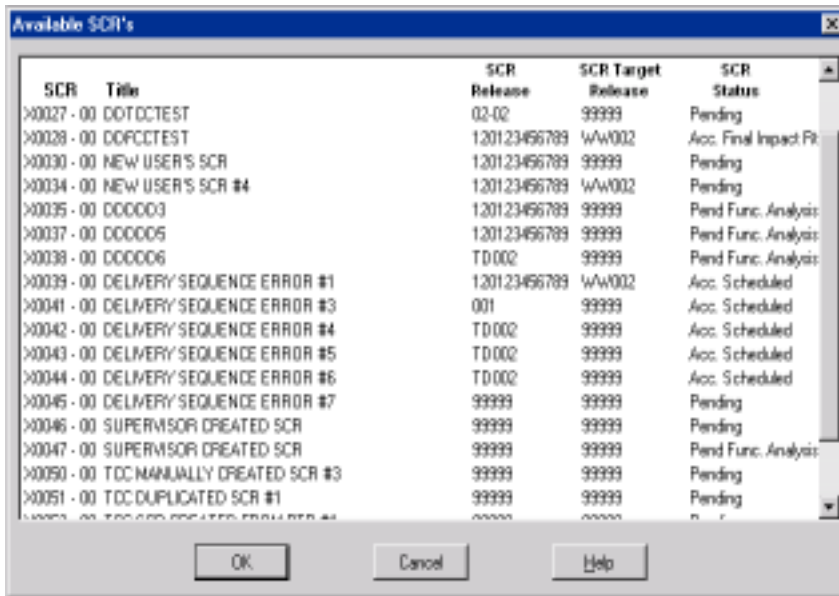
The Release Planning window **SCR Selection** tab lets authorized users assign SCR's to the planning release. If the current user does not have access to add SCR's to the planning

release, the **Add** button will not display. Adding a SCR to a planning release will automatically add all existing amendments to the SCR.

1. Select the Release window **SCR Selection** tab.



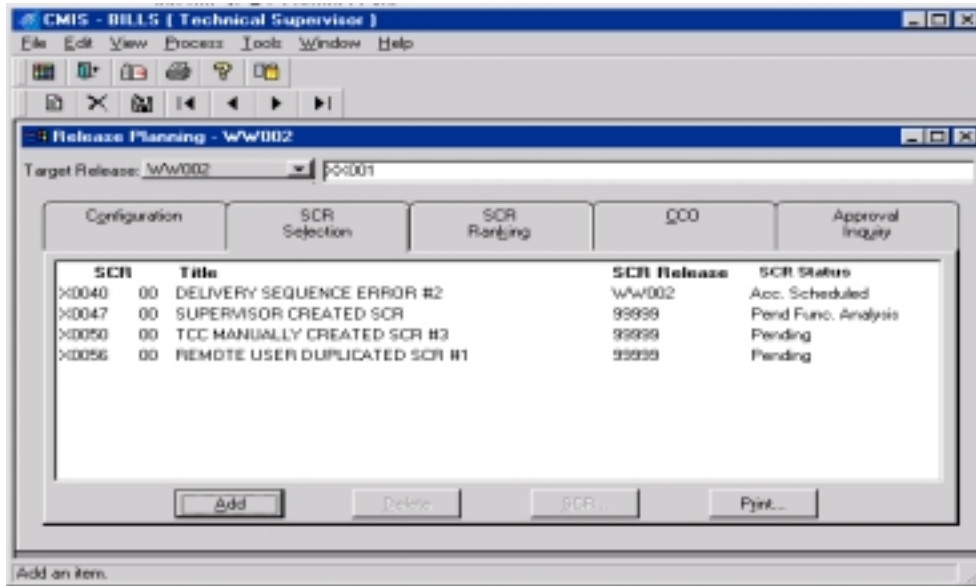
2. Select the **Add** button. The Available SCR's window opens.



3. Click on each SCR you wish to attach to the planning release. To cancel a selection, click on the selected SCR to unselect it. The information displayed for each SCR includes: Release to which the SCR is currently assigned, the SCR's Target Release, and the SCR's current status.

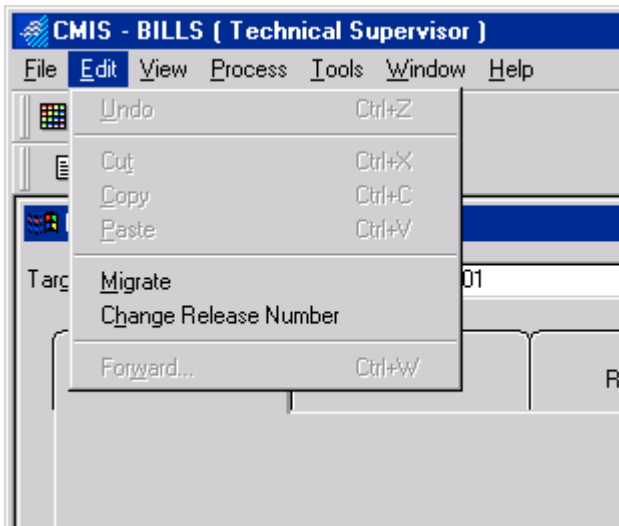
6. When you have made all desired SCR selections, select the **OK** button.

The Available SCR's window closes and the selected SCR's appear on the **SCR Selection** tab. To remove a listed SCR from the release, select the SCR you wish to delete then select the **Delete** button. Deleting an SCR will cause that SCR's and all associated amendments' Target Release to '99999'. For SCR's with amendments, both the parent SCR and its amendments display.

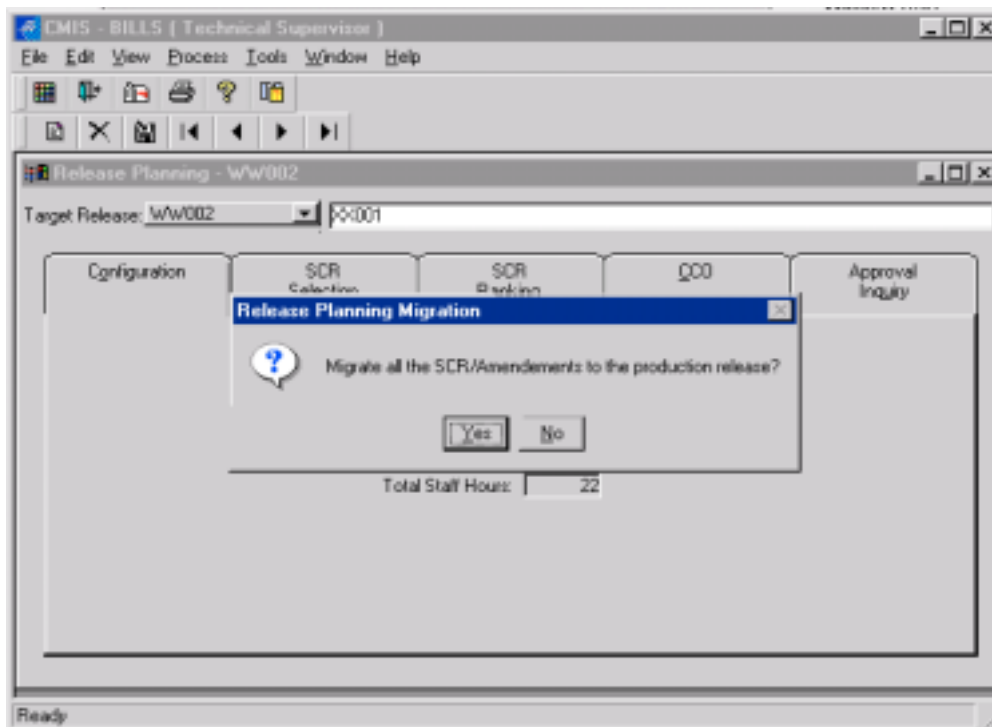


Steps for Migrating SCR's

Select the Release Planning Migration function by selecting **Migration** from the **Process** menu.



The system will prompt the user to confirm that migration is to be performed. Clicking the **No** button or pressing the **Escape** key will cancel migration.



Clicking the **Yes** button will cause the system to process each attached SCR:

- Reviewing the SCR's to ensure that all existing amendments, regardless of the *amendments'* current target release, are migrated with the SCR. Only amendments which have been canceled will be excluded.
- Setting the SCR Release SCR's equal to the Planning Release value.
- Setting the SCR Target Release to "99999"

Chapter 12 - Routing Inquiry Windows



Overview

Routing Inquiry windows allow users to view and print routing and approval information. You can select a system change request (SCR), configuration item (CI) test discrepancy report (TDR), SCR testing TDR, or system testing TDR routing inquiry.

Restrictions

- Access to Routing Inquiry windows depends on the user's security classification and user type. Refer to Chapter 3 for detailed information.



Routing Inquiries Options

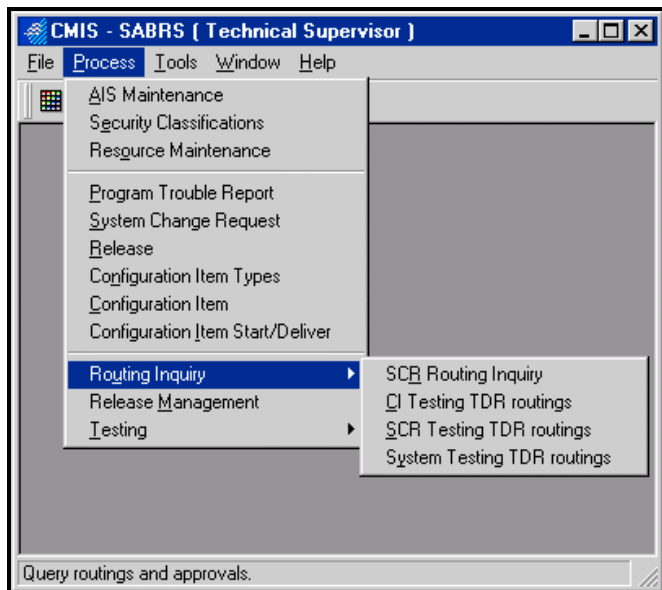
Perform an SCR Routing Inquiry

Perform a CI TDR Routing Inquiry

Perform an SCR Testing TDR Routing Inquiry

Perform a System Testing TDR Routing Inquiry

Open the Routing Inquiry window by selecting the desired item from the **Process** menu **Routing Inquiry** submenu.



Steps for Performing an SCR Routing Inquiry

Users can open a Routing Inquiry window to view and print SCR routings.

1. From the Process menu Routing Inquiry submenu, select SCR Routing Inquiry.

Initially the Filter window will open, requiring you to limit the volume of data CMIS retrieves for display on the Routing Inquiry window.

Filterable Item	Operator	Value
Release (a)	= Equal	RSTC2
Release (b)	Not Filtered	N/A
SCR Number (a)	<> Not Equal	N/A
Amendment Number (a)	Not Filtered	N/A
SCR Number (b)	Not Filtered	N/A
Amendment Number (b)	Not Filtered	N/A
SCR Status	Not Filtered	N/A
Category (a)	Not Filtered	N/A
Category (b)	Not Filtered	N/A

Apply Filter

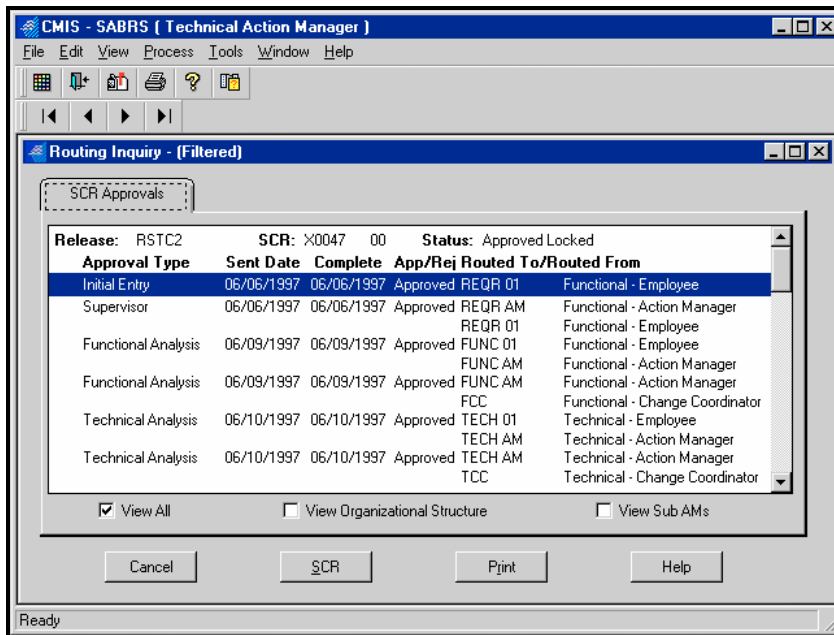
☐ No Filter ☐ Any of These ☒ All of These

OK Cancel Reset Help

NOTE You must define at least one filter or you will not be able to access the Routing Inquiry window for SCR's.

2. For each filterable item, you can select the desired operator for the filter. Operators are symbols or words that control how CMIS handles the filter values.
3. For each filterable item, you can enter the desired value to the right of the selected operator.
4. Select the desired **Apply Filter** radio button.
5. After you have defined the desired filter(s), select the **OK** button.

The Routing Inquiry window for SCR approvals opens. In this example, because the user defined a filter limiting the routings to SCR's in release **RSTC2**, only SCR's attached to release **RSTC2** display.



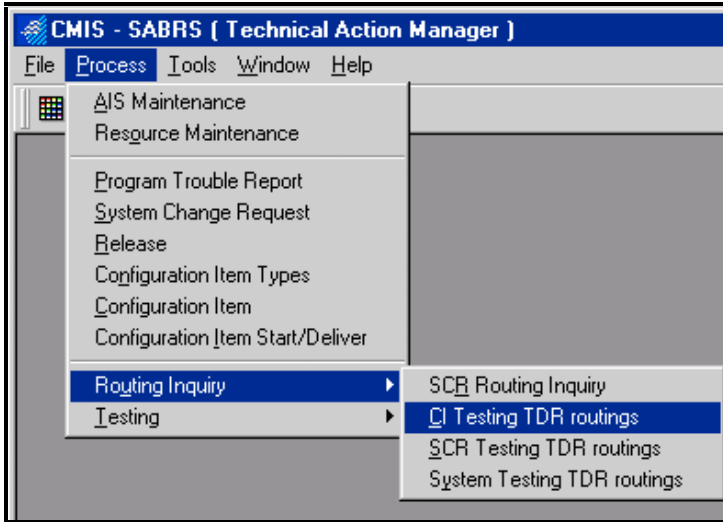
For some user types, such as Configuration Manager and CMIS Administrator, the Routing Inquiry window will contain a single **View All** check box.

6. Check the **View All** check box if you wish to view both closed and open SCR routings. Check the **View Organizational Structure** check box if you wish to view only approval items assigned to resources within your structure. Check the **View Sub AMs** check box if you wish to view items assigned to Sub Action Managers only.
7. To view details of an SCR, select the desired routing and select the **SCR** button. The System Change Request Part Two window will open.
8. If you wish to print the displayed routings list, select the **Print** button.

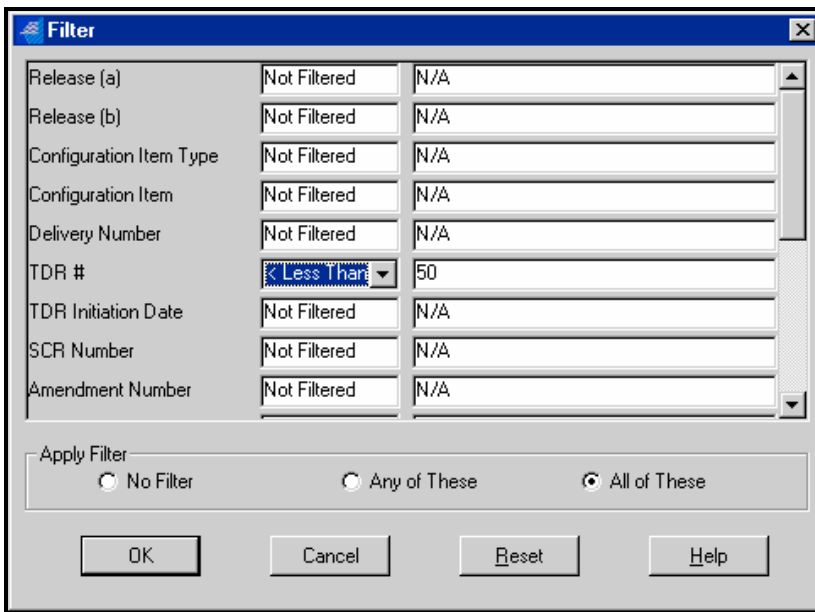
■ Steps for Performing a CI TDR Routing Inquiry

The CI Testing TDR Routing Inquiry window allows users to view and print CI testing TDR routings.

1. From the Process menu Routing Inquiry submenu, select CI Testing TDR routings.



Initially the Filter window will open, requiring you to limit the volume of data CMIS retrieves for display on the CI Testing TDR Routing Inquiry window.



NOTE You must define at least one filter or you will not be able to access the CI Testing TDR Routing Inquiry window.

2. For each filterable item, you can select the desired operator for the filter. Operators are symbols or words that control how CMIS handles the filter values.
3. For each filterable item, you can enter the desired value to the right of the selected operator.
4. Select the desired **Apply Filter** radio button.
5. After you have defined the desired filter(s), select the **OK** button.

The CI Testing TDR Routing Inquiry window opens.

Test Level	TDR	SCR	Delivery Sequence	Dev. CCO Assigned To	Date Created	Date Resolved	Resolution
Release: CBT01 CI: PC - 0040							
001	001	X0018-00	001	TECH 03-	01/13/1997	01/21/1997	Fixed
Release: CIST CI: PC - 0010							
001	001	X0034-00	001	TECH 01-	06/04/1997	00/00/0000	Pending

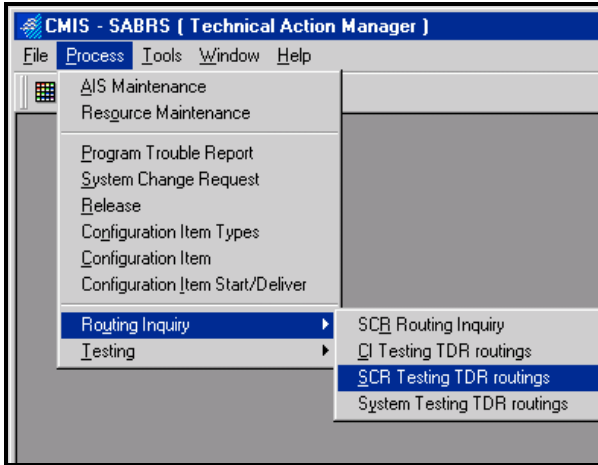
For some user types, such as Configuration Manager and CMIS Administrator, the Routing Inquiry window will contain a single **View All** check box.

6. Check the **View All** check box if you wish to view both closed and open SCR routings. Check the **View Organizational Structure** check box if you wish to view only approval items assigned to resources within your structure. Check the **View Sub AMs** check box if you wish to view items assigned to Sub Action Managers only.
7. If you wish to view SCR details, select the desired routing and select the **SCR** button. The System Change Request Part Two window will open.
8. If you wish to view TDR details, select the desired routing and select the **TDR** button. The Add/Configure CI Test Deficiency Report window will open.
9. If you wish to print the displayed routings list, select the **Print** button.

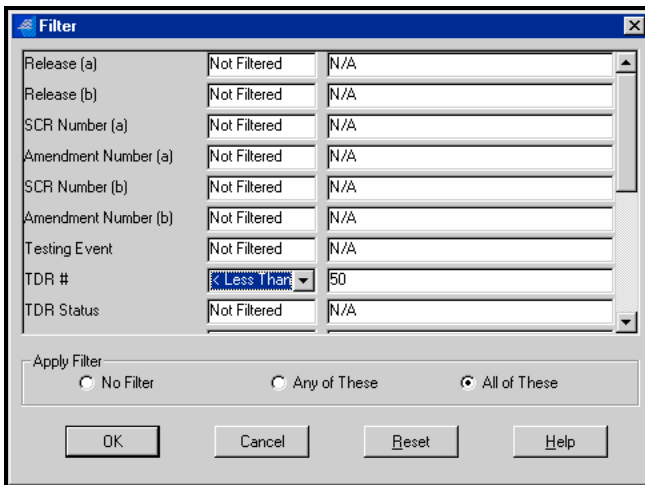
■ Steps for Performing an SCR Testing TDR Routing Inquiry

The SCR Testing TDR Routing inquiry window allows users to view and print SCR testing TDR routing information.

1. From the Process menu Routing Inquiry submenu, select SCR Testing TDR routings.

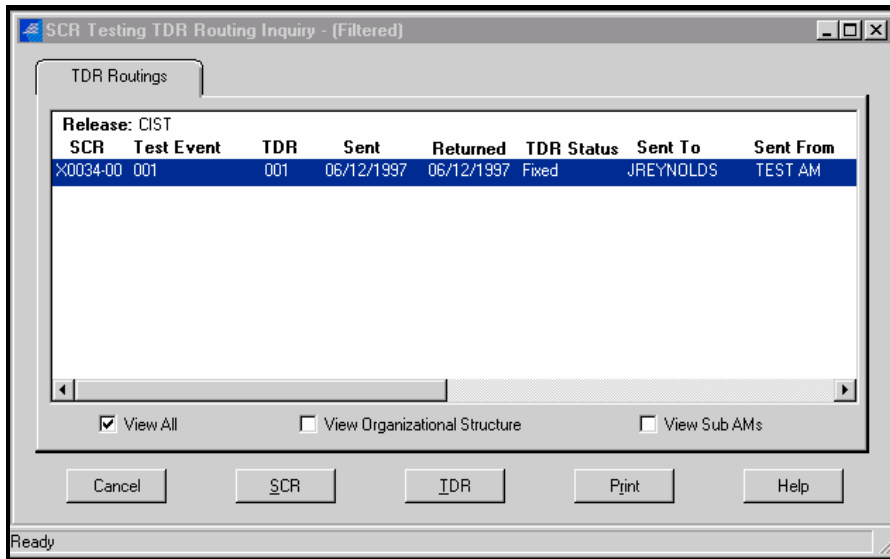


Initially the Filter window will open, requiring you to limit the volume of data CMIS retrieves for display on the SCR Testing TDR Routing Inquiry window.



NOTE You must define at least one filter or you will not be able to access the SCR Testing TDR Routing Inquiry window.

2. For each filterable item, you can select the desired operator for the filter. Operators are symbols or words that control how CMIS handles the filter values.
3. For each filterable item, you can enter the desired value to the right of the selected operator.
4. Select the desired **Apply Filter** radio button.
5. After you have defined the desired filter(s), select the **OK** button.



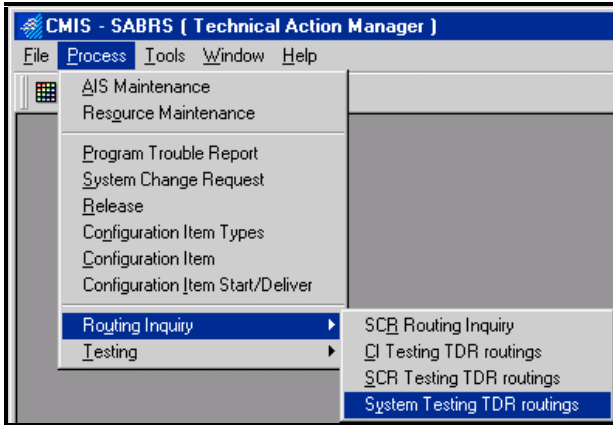
For some user types, such as Configuration Manager and CMIS Administrator, the Routing Inquiry window will contain a single **View All** check box.

6. Check the **View All** check box if you wish to view both closed and open routings. Check the **View Organizational Structure** check box if you wish to view only approval items assigned to resources within your structure. Check the **View Sub AMs** check box if you wish to view items assigned to Sub Action Managers only.
7. To view SCR details, select the desired SCR and select **SCR** button. The System Change Request Part Two window will open.
8. To view TDR details, select the desired routing and select the **TDR** button. The Add/Configure SCR Test Deficiency Report window will open.
9. If you wish to print the displayed routings list, select the **Print** button.

■ Steps for Performing a System Testing TDR Routing Inquiry

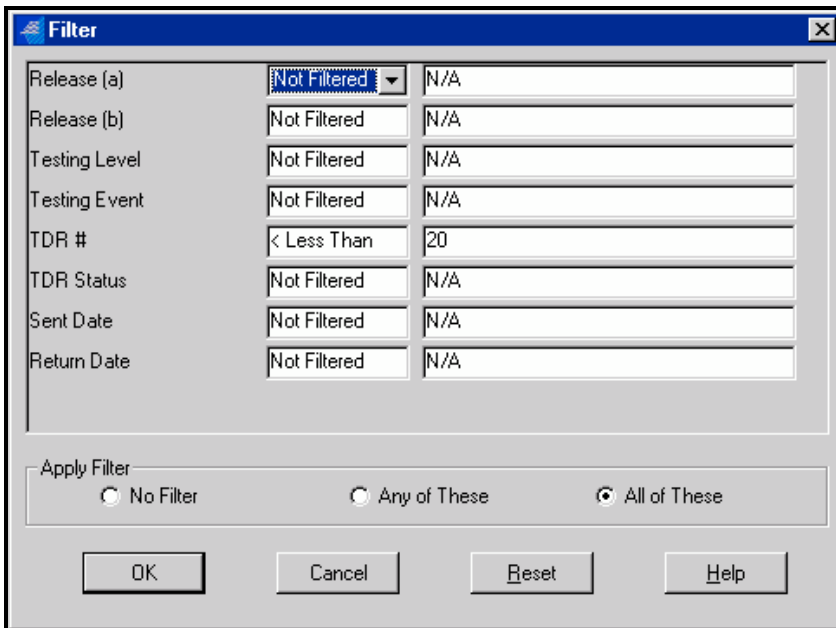
The System Testing TDR Routing window allows users to view and print System Testing TDR Routing information.

1. From the Process menu Routing Inquiry submenu, select System Testing TDR routings.



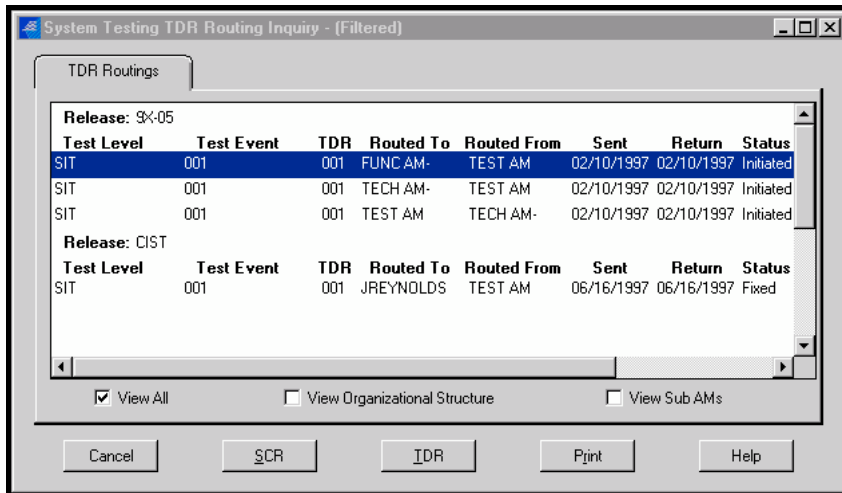
F
i
g

Initially the Filter window will open, requiring you to limit the volume of data CMIS retrieves for display on the System Testing TDR Routing Inquiry window.



NOTE You must define at least one filter or you will not be able to access the System Testing TDR Routing Inquiry window.

2. For each filterable item, you can select the desired operator for the filter. Operators are symbols or words that control how CMIS handles the filter values.
3. For each filterable item, you can enter the desired value to the right of the selected operator.
4. Select the desired **Apply Filter** radio button.
5. After you have defined the desired filter(s), select the **OK** button.

F
i
g
u
r
e

For some user types, such as Configuration Manager and CMIS Administrator, the Routing Inquiry window will contain a single **View All** check box.

6. Check the **View All** check box if you wish to view both closed and open routings. Check the **View Organizational Structure** check box if you wish to view only approval items assigned to resources within your structure. Check the **View Sub AMs** check box if you wish to view items assigned to Sub Action Managers only.
7. To view SCR details, select the desired routing and then select the **SCR** button. The System Change Request Part Two window will open.
8. To view TDR details, select the desired routing and then select the **TDR** button. The Configure System TDR window will open.
9. If you wish to print the displayed list of approvals select the **Print** button

Chapter 13 - Configuration Item Start/Deliver



Overview

The Configuration Item (CI) Start/Deliver window allows authorized users to start and deliver developmental and quality assurance (QA) CI tasks. CI tasks are also known as configuration change orders (CCO's).

CI Start/Deliver processes are available only if the release is locked or the CI's **Modify on an Unlocked Release** check box is enabled. To start or deliver a CCO on an unlocked amendment, select the release number of the amendment's parent SCR. Most users can only access the CCO's to which they have been assigned.

Developers start CI tasks to indicate they are ready to begin the actual work involved in a CCO. Testers start QA tasks to indicate they are ready to begin a test. After completing the work, the user delivers the CCO. Authorized users then review the deliveries through the Release Management Processing window and can either reject or complete the delivery.

After starting a task, the developer modifies the CI as prescribed by the SCR. After making all necessary changes, the developer delivers the CI task or CCO. When a tester is ready to begin testing the work the developer has done on the CI, the tester starts a QA CI task.

The Configuration Item Start/Deliver window is divided into the following tabs.

Start Tab

Displays developmental CI's that have associated CCO's pending.

Deliver Tab

Displays developmental CI tasks that are awaiting delivery.

Re-Deliver Tab

Allows users to redeliver CI tasks rejected via release management processing due to an invalid date/time stamp.

Quality Assurance Tab

Displays pending quality assurance tasks.

Restrictions

- User types Remote User and Higher Authority cannot access the Configuration Item Start/Deliver window. Action Managers (AM's) can start tasks for their employees only. Configuration Managers (CM's) can start any task.



Configuration Item Start/Deliver Window Options

Start a CI

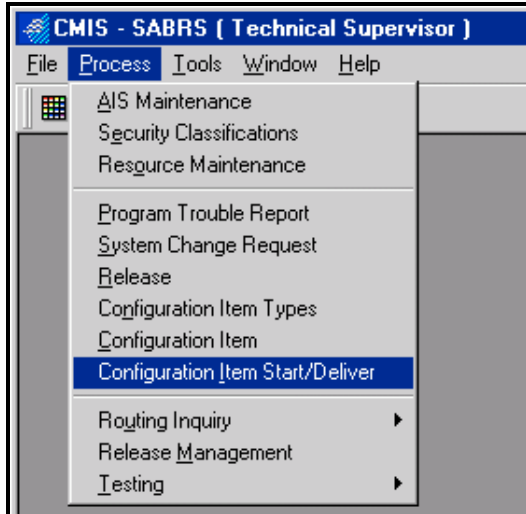
Deliver a CI

Redeliver a CI

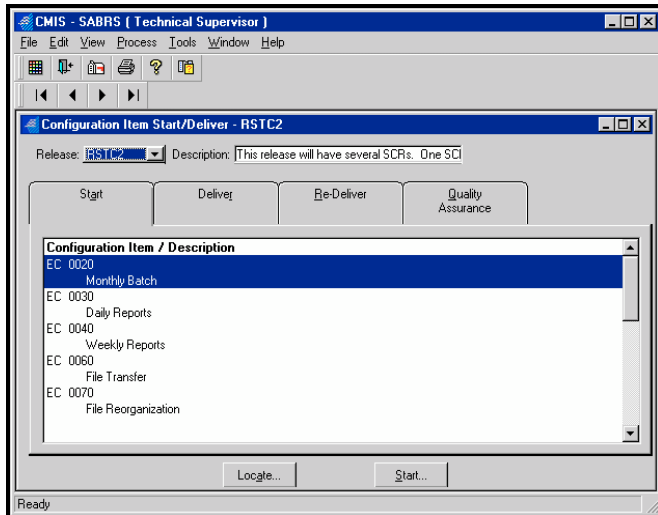
Start a QA CI

Print CI Start/Deliver Reports

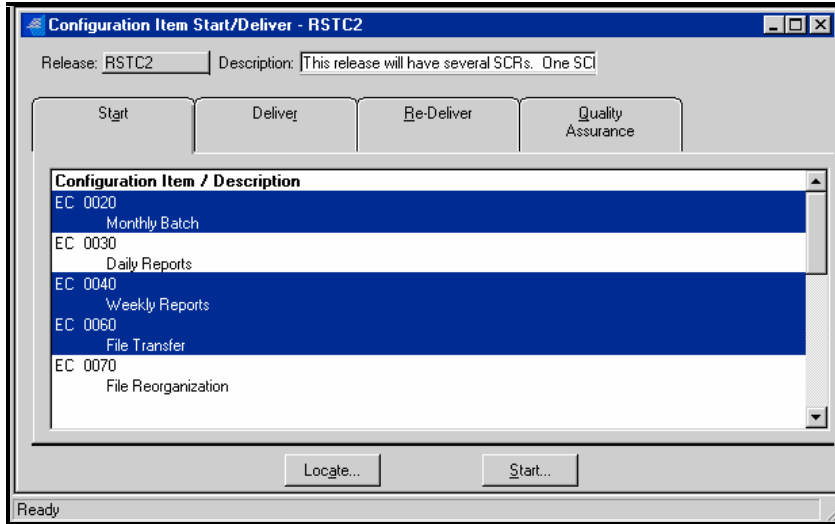
Open the Configuration Item Start/Deliver window by selecting **Configuration Item Start/Deliver** from the **Process** menu.



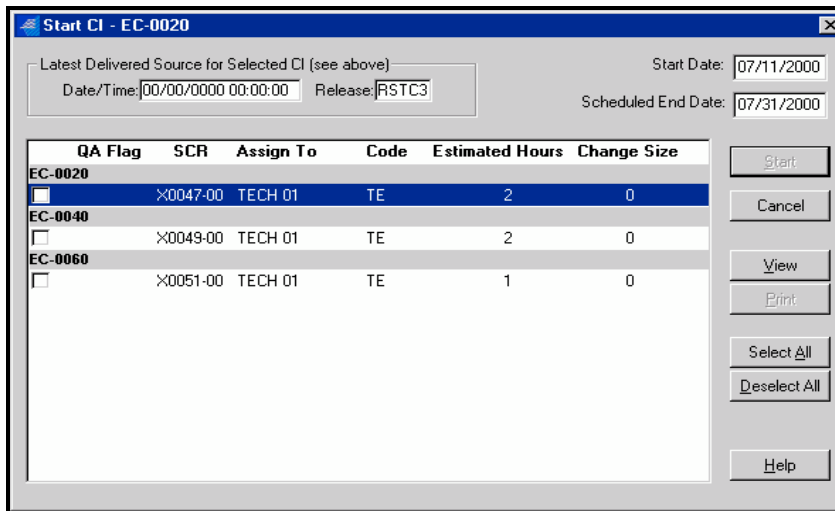
The Configuration Item Start/Deliver window opens.



1. Select the Configuration Item Start/Deliver window **Start** tab.
2. Select the CI you wish to start. You can select more than one CI by holding down the CTRL key and clicking on each desired item.
3. Select the **Start** button.



The Start CI window opens. The **Start Date** defaults to the current date. You can change this date if necessary.



4. Enter the date you anticipate the CI tasks will be completed in the required **Scheduled End Date** field.
5. Select each CI you wish to start by clicking on its associated check box. To select all listed CI's, select the **Select All** button. To deselect all listed CI's, select the **Deselect All** button.

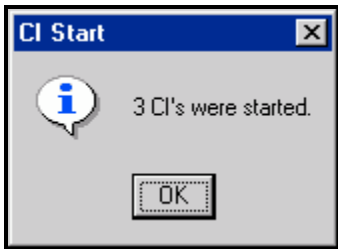
A checkmark will appear in each check box you select, and the **Start** button will enable.

6. To view information on the SCR associated with the selected CCO, select the **View** button, and the System Change Request Part Two window will open.

QA Flag	SCR	Assign To	Code	Estimated Hours	Change Size
<input checked="" type="checkbox"/>	X0047-00	TECH 01	TE	2	0
<input checked="" type="checkbox"/>	X0049-00	TECH 01	TE	2	0
<input checked="" type="checkbox"/>	X0051-00	TECH 01	TE	1	0

7. Select the **Start** button.

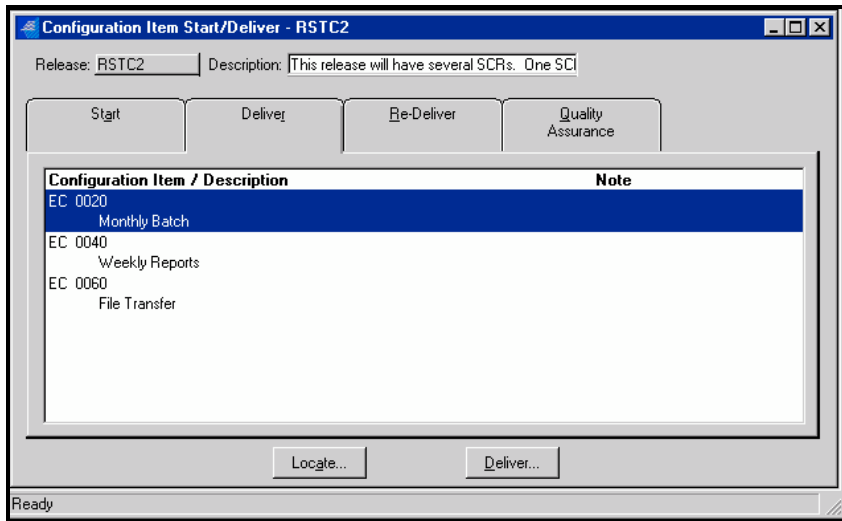
A message will confirm the number of CI's started.



■ Steps for Delivering a CI Task

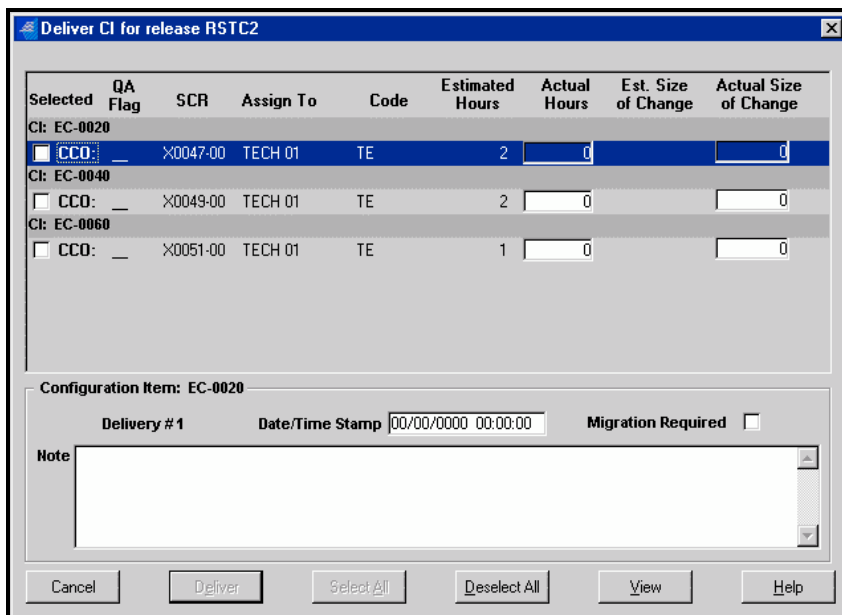
The Deliver CI option allows users to deliver completed CI tasks.

1. Select the Configuration Item Start/Deliver window **Deliver** tab.



2. Select the desired CI task. You can select more than one CI task by holding down the CTRL key and clicking on each desired item.
3. Select the **Deliver** button.

The Deliver CI window opens.



4. For each CI task you're ready to deliver, select the corresponding check box. A checkmark will appear in each check box you select.

Selected	QA Flag	SCR	Assign To	Code	Estimated Hours	Actual Hours	Est. Size of Change	Actual Size of Change
<input checked="" type="checkbox"/>	CCO: _	X0047-00	TECH 01	TE	2	3		5
<input checked="" type="checkbox"/>	CCO: _	X0049-00	TECH 01	TE	2	4		5
<input checked="" type="checkbox"/>	CCO: _	X0051-00	TECH 01	TE	1	3		5

Configuration Item: EC-0060

Delivery # 1 Date/Time Stamp 00/00/0000 00:00:00 Migration Required ☐

Note: This CCO is part of a student database

Buttons: Cancel, Deliver, Select All, Deselect All, View, Help

5. Enter a date and time in the **Date/Time Stamp** field.
6. If the CI task will cause data to migrate into but not completely replace existing data, for example, if it will replace a portion of a database schema, you can check the **Migration Required** check box.
7. If desired, you can enter comments about the CI task in the **Note** text field.
8. You can deselect all selected CI's and any related delivery data you entered by selecting the **Deselect All** button.
9. To view information on the SCR associated with the selected task, select the **View** button. The System Change Request Part Two window will open.
10. You must enter a value for the **Actual Hours** field for each CI you're delivering if the AIS Maintenance window **Require Actual Hours Per CI** check box is enabled for the AIS.
11. Select the **Deliver** button.

A message will ask you to confirm the CI delivery.

Deliver selected items

Do you want to deliver selected items now?

Buttons: Yes, No

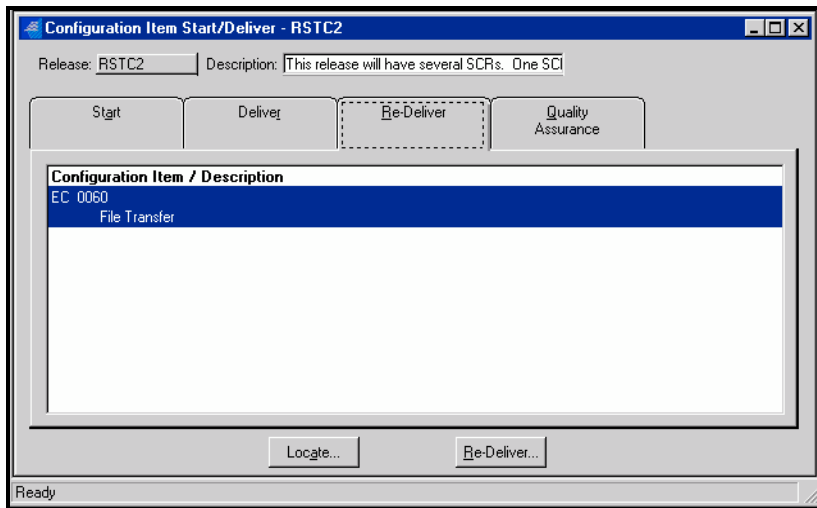
Fig

12. Select the **Yes** button to complete the delivery or **No** to cancel the delivery.

Steps for Redelivering a CI

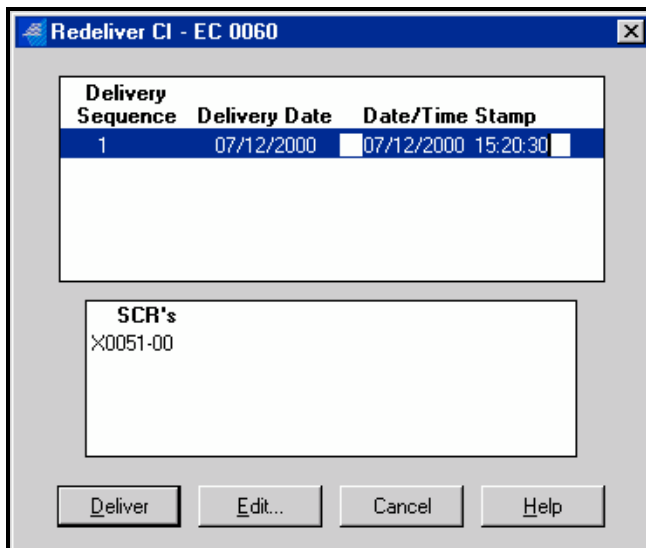
The redeliver CI option allows users to redeliver CCO's rejected via release management processing for some reason.

1. Select the Configuration Item Start/Deliver window **Redeliver** tab.



2. Select the desired CI task. You can select more than one item by holding down the CTRL key and clicking on each desired item.
3. Select the **Re-Deliver** button.

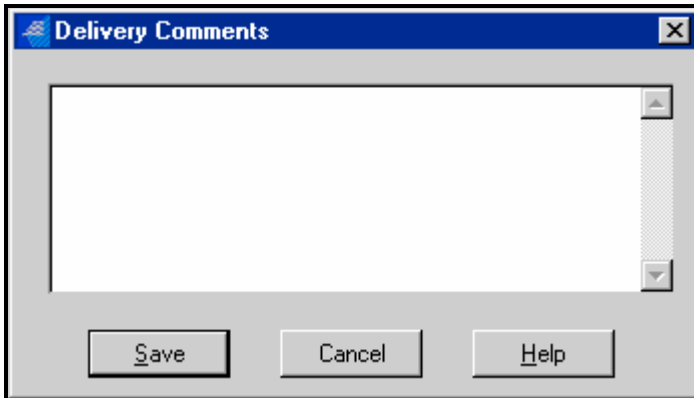
The Redeliver CI window opens.



4. Enter a value in the required **Date/Time Stamp** field.
To add comments about the redelivery, select the **Edit** button.

F
i

5. If you select the **Edit** button, the Delivery Comments window opens. Enter any desired comments about the delivery, then select the **Save** button.



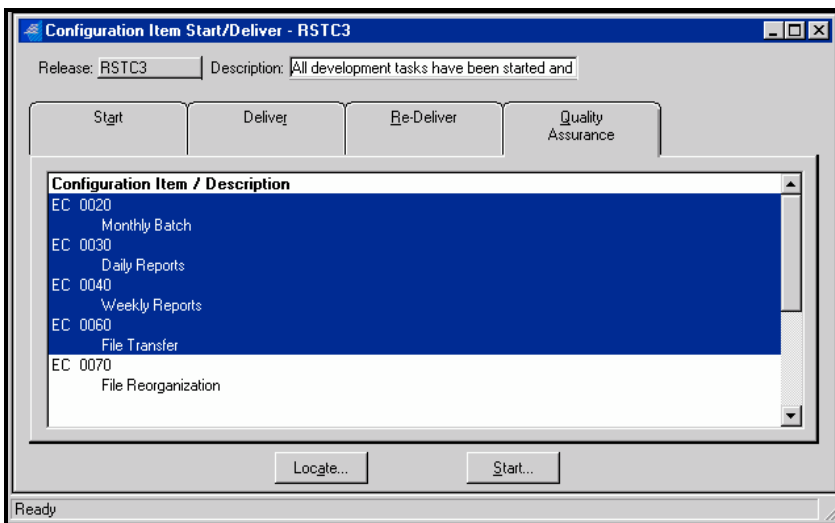
After you select **Save**, the Delivery Comments window will close.

6. Select the Redeliver CI window **Deliver** button to redeliver the CI.

■ Steps for Starting a QA CI

The **Start/Deliver CI** option allows you to start a QA CI task. QA CI's are completed in the **CI Testing** process.

1. Select the Configuration Item Start/Deliver window **Quality Assurance** tab.
2. Select the QA CI tasks you wish to start. You can select more than one QA CI task by holding down the CTRL key and clicking on each desired item.



3. Select the **Start** button.

The Start CI window opens, displaying a **QA** flag for each CI you selected.

QA Flag	SCR	Assign To	Code	Estimated Hours	Change Size	
<input checked="" type="checkbox"/>	QA	X0052-00	TTST 01	TTST	4	0
<input checked="" type="checkbox"/>	QA	X0053-00	TTST 01	TTST	4	0
<input checked="" type="checkbox"/>	QA	X0054-00	TTST 01	TTST	4	0
<input type="checkbox"/>	QA	X0056-00	TTST 01	TTST	4	0

4. Enter the date you anticipate the QA CI to be completed in the required **Scheduled End Date** field.
5. Select each CI you wish to start by clicking on its associated check box. To select all listed CI's, select the **Select All** button.

A checkmark will appear in each check box you select. After you select one or more QA CI tasks, the **Start** button will enable.

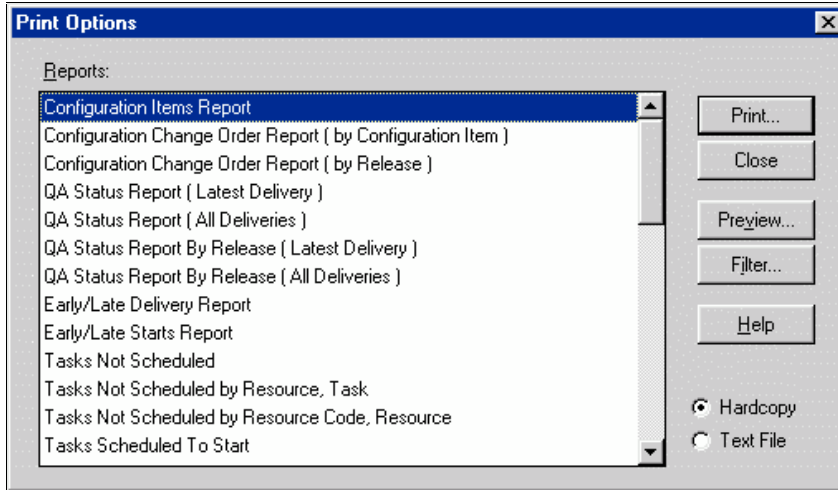
6. To view information on the SCR associated with the selected CI, select the **View** button and the System Change Request Part Two window will open.
7. Select the **Start** button to start the QA CI's.

■ Steps for Printing CI Start/Deliver Reports

There are several CMIS reports related to starting and delivering CI's. You can view the desired report on your monitor, print a hard copy of the report, filter the report, or save the report as a text file.

1. On the CI Start/Deliver window, select the desired release from the **Release** drop-down list.
2. Select the **Print** toolbar button.

The Print Options window opens.



3. Select the desired report.

You can view the report on your monitor by selecting the **Preview** button. For some reports, a filter is available. To access the report Filter window, select the **Filter** button. You can save the report as a text file by selecting the **Report Format Text File** radio button, then selecting the **Print** button.

4. To print the selected report, select the **Print** button.

Chapter 14 - Release Management Processing Window



Overview

When users complete work on the tasks for an SCR (system change request), they deliver the tasks or CI's (configuration items) via the Configuration Item Start/Deliver window. When CI's are delivered, authorized users review and subsequently complete or reject deliveries via the Release Management Processing window. Completing a delivery implies acceptance of the delivery. When all deliveries for the release have been completed, the release can be certified.

The Release Management Processing window is organized into the following tabs:

Configuration Tab

Contains the message interval, indicating in minutes approximately how often CMIS will send your messages and check your mailbox for new messages. When release management (RM) personnel are expecting deliveries, they can change the interval so CMIS checks for delivery messages more frequently.

Deliveries Tab

Displays a list of all deliveries for the selected release.

Processed Tab

Displays a list of all completed and rejected deliveries for the selected release.

Restrictions

- Only user types Configuration Manager (CM), Release Manager (RM), and CMIS Administrator can complete and reject deliveries. Authorized users can view detailed information on deliveries.



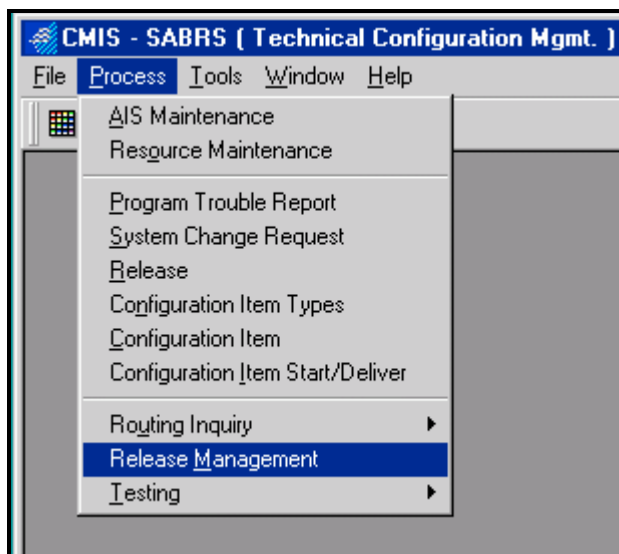
Release Management Processing Window Options

Complete a Delivery

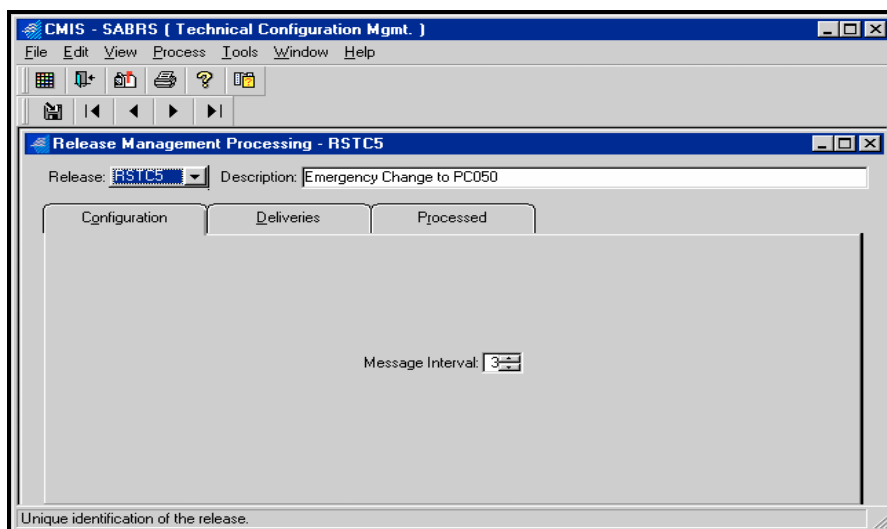
Reject a Delivery

Print Release Management Processing Reports

Open the Release Management Processing window by selecting **Release Management** from the **Process** menu.

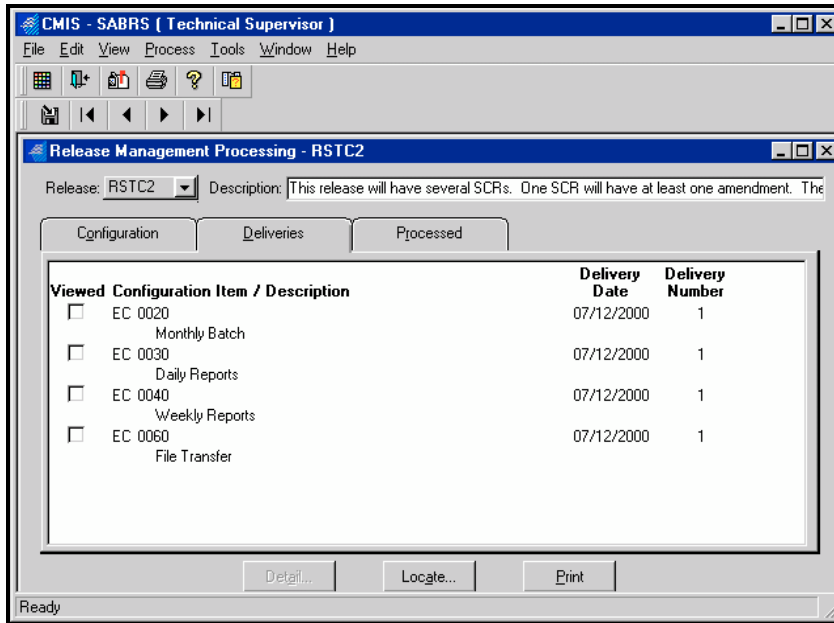


The Release Management Processing window opens.



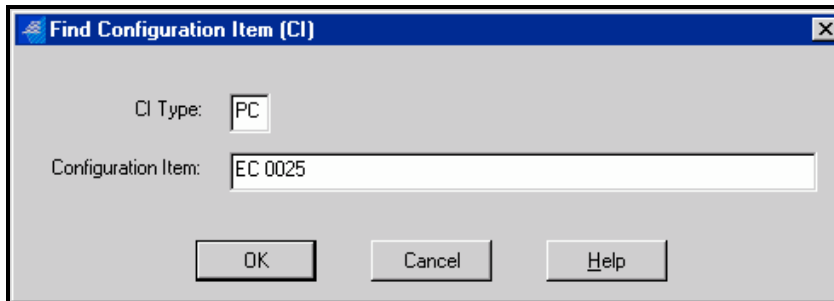
Steps for Completing a Delivery

1. Select the Release Management Processing window **Deliveries** tab.



2. If a delivery you wish to complete does not appear in the list, select the **Locate** button.

The Find Configuration Item (CI) window opens.



3. Enter the desired CI type in the **CI Type** field.
4. If you know the CI name, enter it in the **Configuration Item** field.
5. Select the **OK** button.

The selection bar will jump to the first listed CI delivery of the type you searched for.

6. You can view delivery details by selecting the desired delivery, then selecting the **Detail** button.

The Delivery Details window opens.

Release: RSTC2 CI: EC 0030 Delivery: 1

Configuration **CCO**

CI: EC 0030

CI Description: Daily Reports

Release: RSTC2 Delivery Date: 07/12/2000

Delivery Number: 1 Document ID:

Analyst: TECH SP Code: FR

Date/Time Stamp: 00/00/0000 00:00:00 ☐ Migration

Comments:

Close Print Help

You can print the detailed information for the selected delivery by selecting the **Print** button. Select the **Close** button when you're ready to close the Delivery Details window.

7. Select the deliveries you wish to complete.
8. Select **Complete Delivery** from the **Edit** menu.

CMIS - SABRS (Technical Supervisor)

File Edit View Process Tools Window Help

Undo Ctrl+Z

Cut Ctrl+X

Copy Ctrl+C

Paste Ctrl+V

Complete Delivery

Reject Delivery

Configuration Deliveries Processed

Viewed	Configuration Item / Description	Delivery Date	Delivery Number
<input checked="" type="checkbox"/>	EC 0020 Monthly Batch	07/12/2000	1
<input type="checkbox"/>	EC 0030 Daily Reports	07/12/2000	1
<input checked="" type="checkbox"/>	EC 0040 Weekly Reports	07/12/2000	1
<input type="checkbox"/>	EC 0060 File Transfer	07/12/2000	1

Detail... Locate... Print

Complete the delivery for the current item.

The Delivery Complete window will open. The Completion Date defaults to the current date.

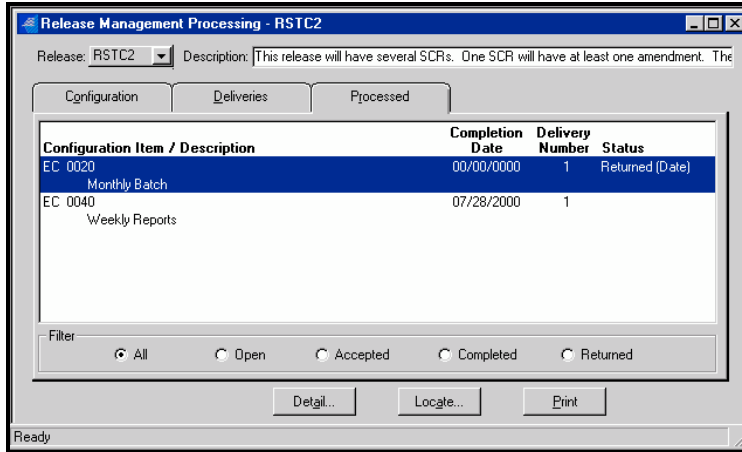
Delivery Complete

Completion Date: 07/27/2000

Save Cancel Help

9. Select the **Save** button.

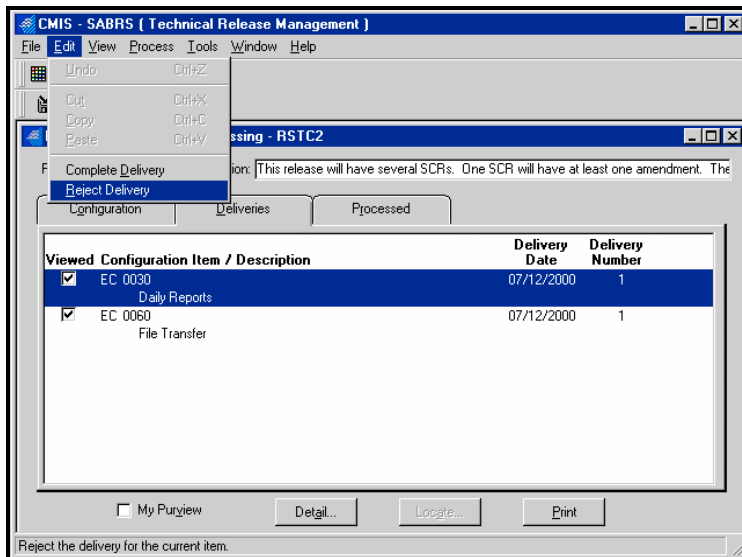
The Delivery Complete window will close. The completed deliveries appear on the **Processed** tab list.



Steps for Rejecting a Delivery

Authorized users can reject CI deliveries because of an invalid date or for other reasons. If the date/time stamp on a delivered CI does not match the date/time stamp on the library version of the CI, the delivery is rejected due to an invalid date. In practice, deliveries are rarely rejected.

1. Select the Release Management Processing window **Deliveries** tab.
2. Select the delivery you wish to reject.
3. Select **Reject Delivery** from the **Edit** menu.

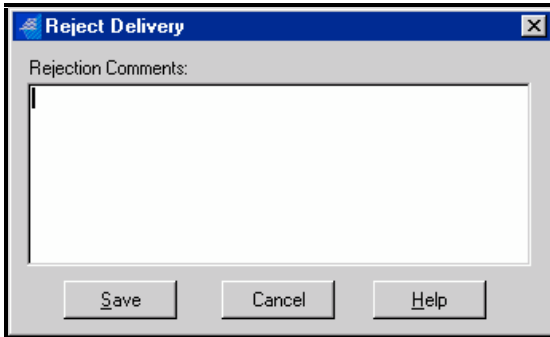


A message asks if you wish to reject the delivery due to an invalid date.



4. If the rejection is not due to an invalid date, select the **No** button.

If you select **No**, the Reject Delivery window opens.



5. Enter any desired comments in the **Rejection Comments** text field.
6. Select the **Save** button.

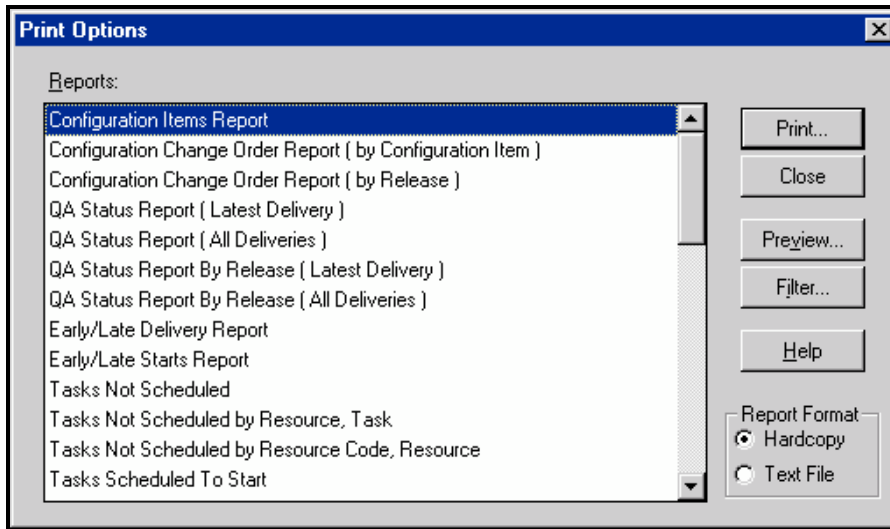
The Reject Delivery window closes and the rejected delivery displays on the **Processed** tab list.

■ Steps for Printing Release Management Processing Reports

There are several CMIS reports related to RM processing. You can view the desired report on your monitor, print a hard copy of the report, filter the report, or save the report as a text file.

1. On the Release Management Processing window, select the desired release from the **Release** drop-down list.
2. Select the **Print** toolbar button.

The Print Options window opens.



3. Select the desired report.

You can view the report on your monitor by selecting the **Preview** button. For some reports, a filter is available. To access the report Filter window, select the **Filter** button. You can save the report as a text file by selecting the **Report Format Text File** radio button, then selecting the **Print** button.

4. To print the selected report, select the **Print** button.

Chapter 15 - CI Testing Window



Overview

This chapter discusses configuration item (CI) testing, including the process for starting a CI testing task via the Configuration Item Start/Deliver window. This chapter also discusses the steps for testing a CI, creating and forwarding a CI test, modifying a CI test, deleting a CI test, and canceling a CI test deficiency report (TDR).

The CI Testing window allows users to record, maintain, and review information on CI delivery testing. The CI Testing window has the following six tabs:

Configuration Tab

Lists the CI deliveries for which users can create, modify, or view testing information.

Testing Details Tab

Provides testing information on the selected CI delivery.

Levels Tab

Provides options for creating, modifying, and deleting CI testing levels.

TDR Tab

Allows users to create, delete, modify, and view TDR's for the CI delivery under testing.

View QA CCO's Tab

Allows users to access information on the selected CI delivery's QA (quality assurance) CCO's (configuration change orders).

SCR's Tab

Provides users with information on the selected CI delivery's system change requests (SCR's).

Restrictions

- CI testing processes are not available to user types Remote User and Higher Authority.
- The CI must have been started, delivered, and processed by release management (if designated as a deliverable) before CI testing can begin.
- The release must be locked before CI testing can begin.
- The QA CCO must exist prior to delivery of the corresponding development CCO.



CI Testing Options

Start a CI Testing Task

Test a CI and Forward CI Test

Create a CI TDR

Modify a CI TDR

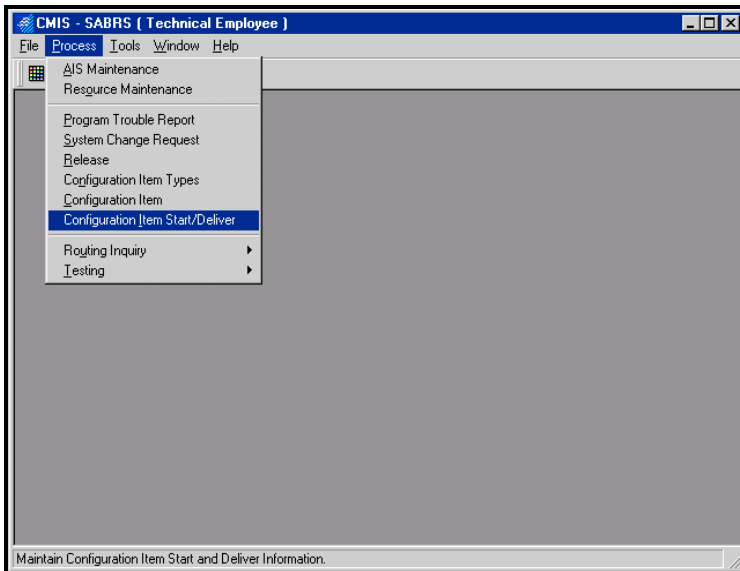
Delete a CI TDR

Cancel a CI TDR

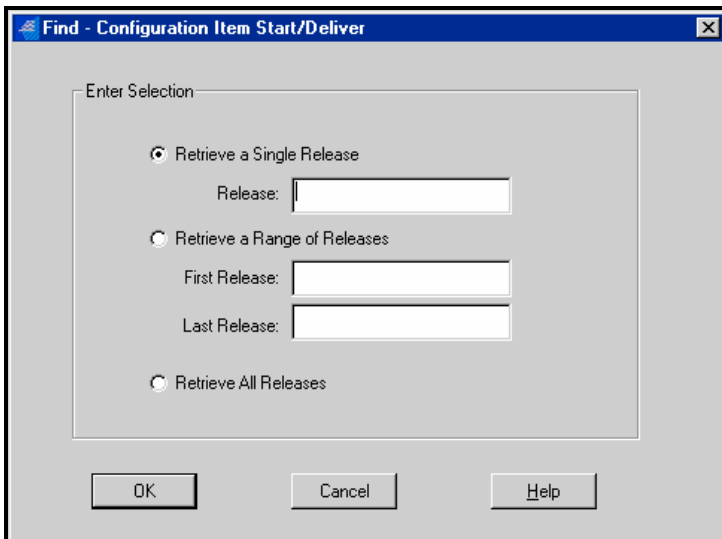
■ *Steps for Starting a CI Testing Task*

You must start the CI testing task before you can start CI testing.

1. From the **Process** menu select **Configuration Item Start/Deliver**.

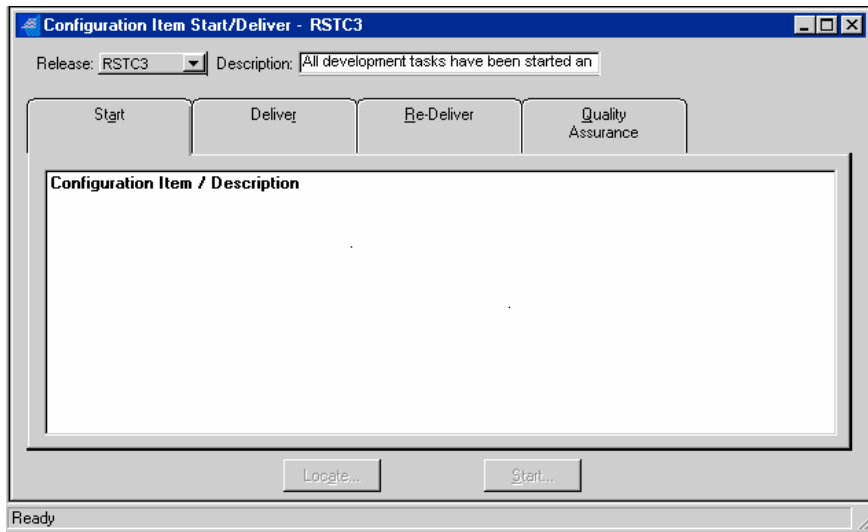


2. The Find window opens. You can select the desired release on the Find window or on the Configuration Item Start/Deliver window.

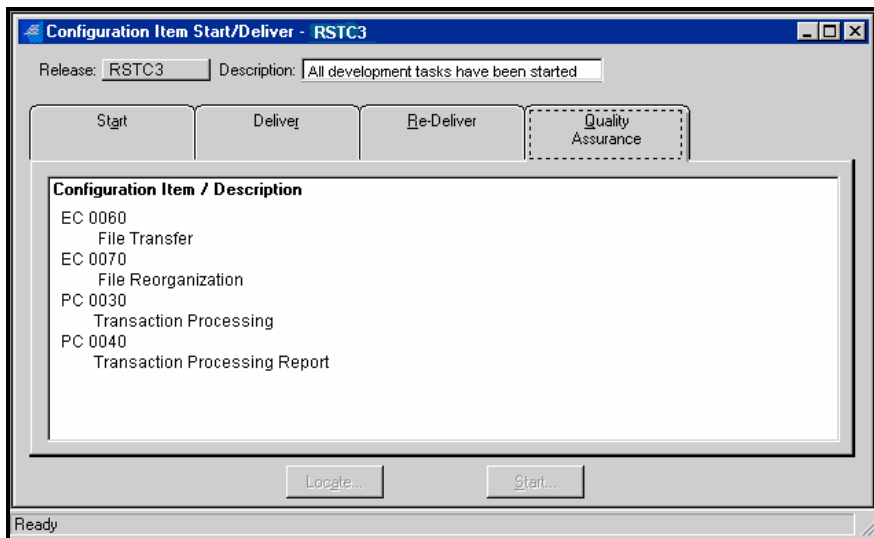


3. Select the **Cancel** button to close the Find window. The Configuration Item Start/Deliver

window opens.



4. From the **Release** drop-down list, select the release for which you will be conducting CI testing.
5. Select the **Quality Assurance** tab to view the list of CI's available for testing.



6. Select the CI scheduled for testing, then select the **Start** button.

The Start QA CI window will open.

QA Flag	SCR	Assign To	Code	Estimated Hours
<input checked="" type="checkbox"/>	QA	X0056-00	TTST 01	TTST 4

- Click on the **QA CI** check box to enable it.

The values for **Start Date** and **Scheduled End Date** default to the current date. You can change these default values if you wish.

If you wish to view SCR details, use the **View** button to open the SCR Part Two window. The **Print** button lets you print the tasking assignment for the CI.

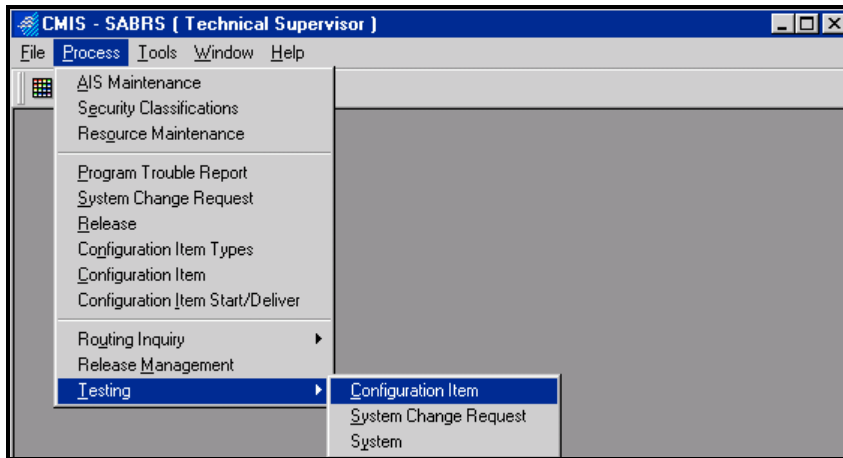
- Select the **Start** button to start the QA CI task.

Selecting the **Start** button will save the QA CI information and close the Start QA CI window. A message will inform you that the CI was started. Select **OK**.

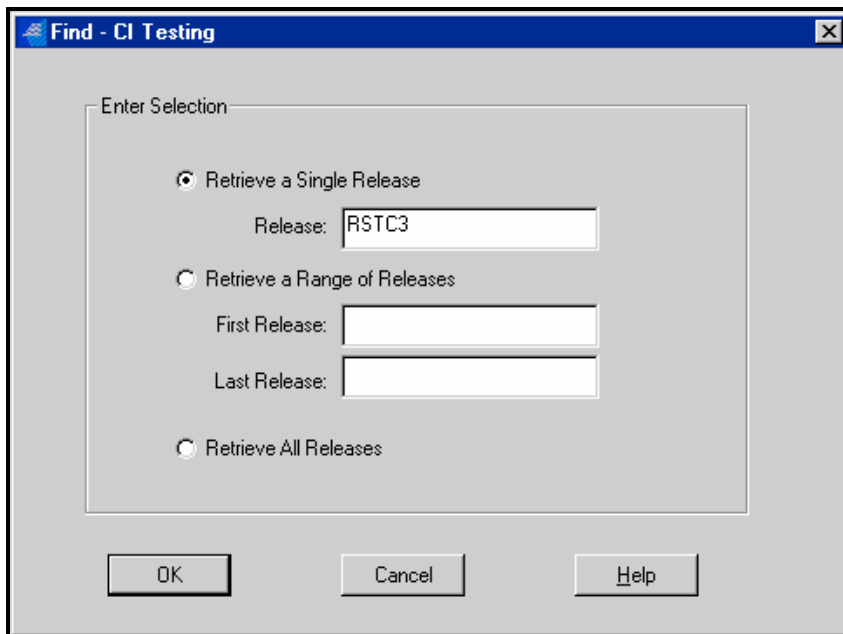
- Select the **File** menu **Close** item or the window's close button to close the Configuration Item Start/Deliver window.

■ Steps for Testing a CI and Forwarding a CI Test

1. From the **Process** menu, select **Configuration Item** from the **Testing** submenu.

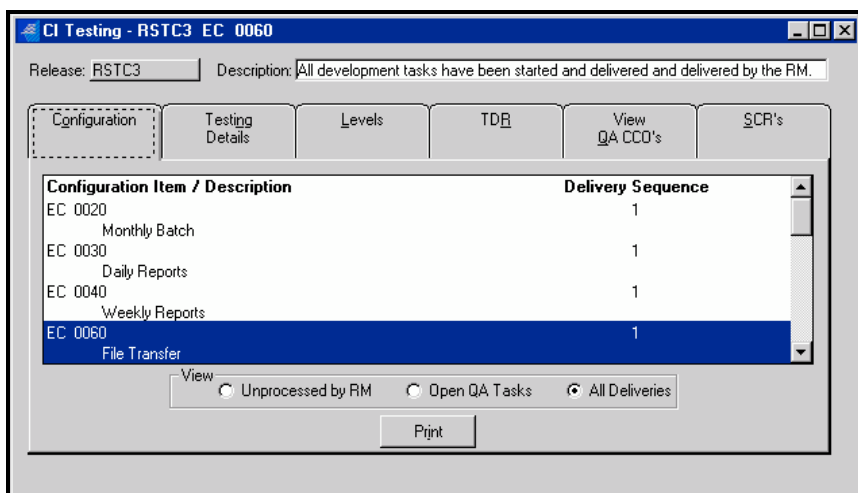


The Find window will open.

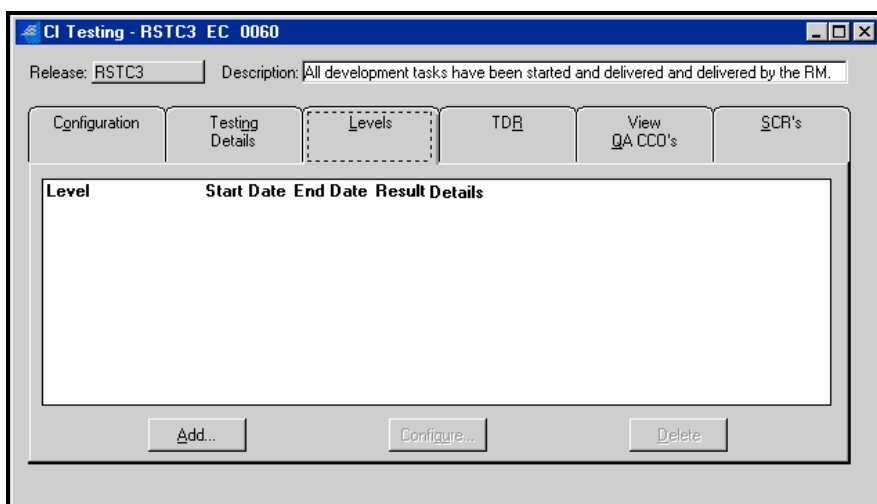


2. Enter the desired release number in the **Retrieve a Single Release** field.
3. Select the **OK** button.

The CI Testing window opens.

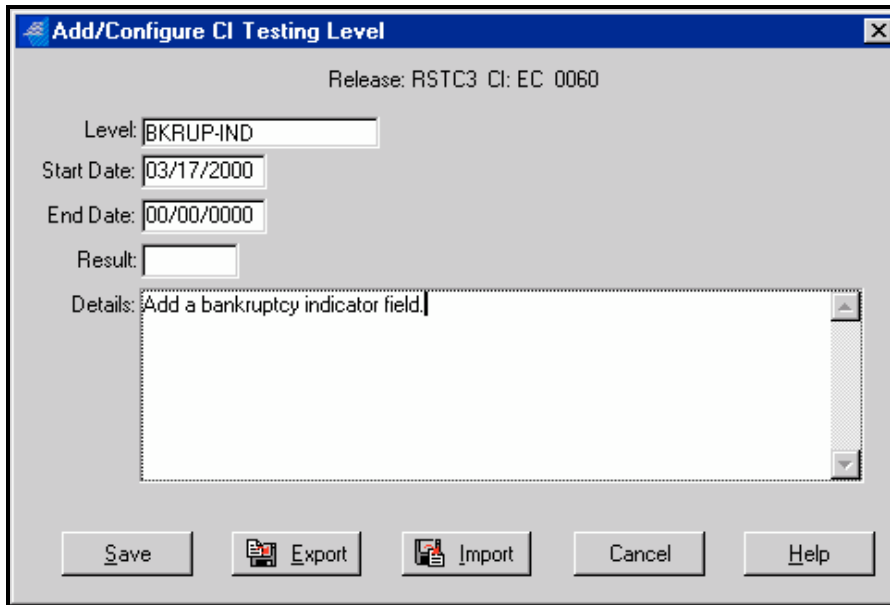


4. Select the CI you are going to test.
5. Select the **Levels** tab.



6. Select the **Add** button.

The Add/Configure CI Testing Level window opens.



The window titled "Add/Configure CI Testing Level" displays the following fields and controls:

- Release: RSTC3 CI: EC 0060
- Level: BKRUP-IND
- Start Date: 03/17/2000
- End Date: 00/00/0000
- Result:
- Details: Add a bankruptcy indicator field.
- Buttons: Save, Export, Import, Cancel, Help

7. Enter a test description of up to 12 characters in the **Level** field.

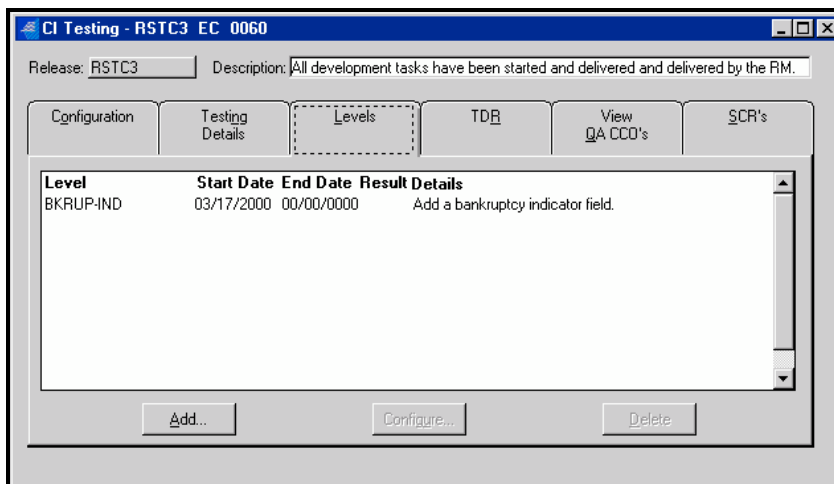
The **Start Date** defaults to the current date but you can change this value, if you wish.

8. You can enter any additional information about the test in the **Details** field.

You can use the **Import** button to import a text file into the **Details** field. You also can use the **Export** button to export the **Details** text and save it as a text file for use in another application or another CMIS text field.

9. Select the **Save** button.

After you select **Save**, the Add/Configure CI Testing Level window closes. The information you entered for the CI test now displays on the **Levels** tab of the CI Testing window.



The window titled "CI Testing - RSTC3 EC 0060" displays the following information:

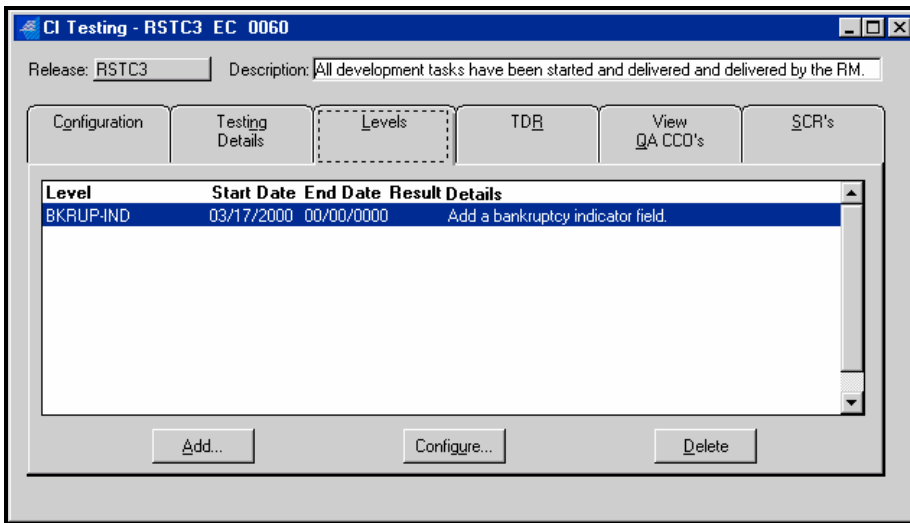
- Release: RSTC3 Description: All development tasks have been started and delivered and delivered by the RM.
- Tabs: Configuration, Testing Details, **Levels**, TDR, View QA CCD's, SCR's
- Table:

Level	Start Date	End Date	Result	Details
BKRUP-IND	03/17/2000	00/00/0000		Add a bankruptcy indicator field.

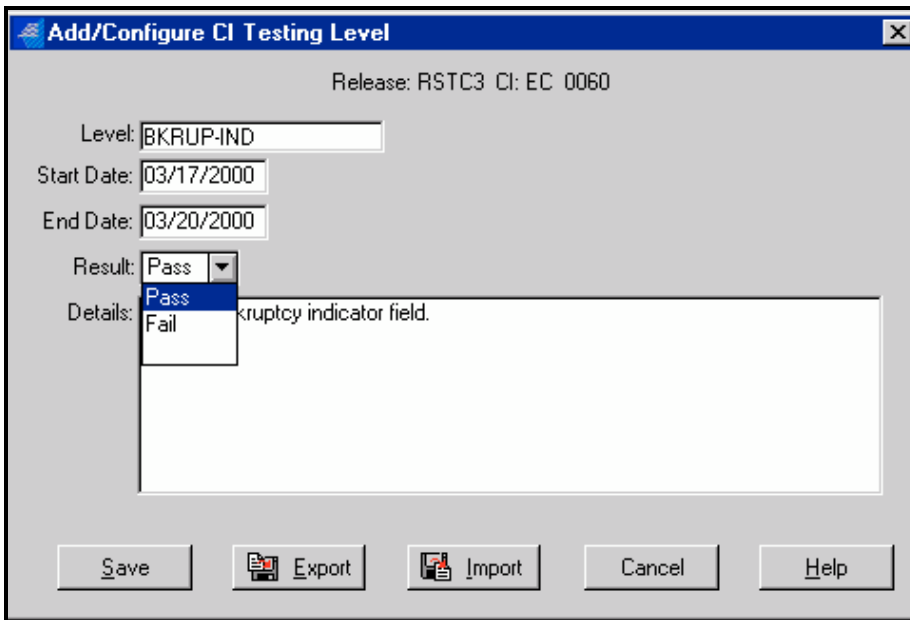
- Buttons: Add..., Configure..., Delete

After you complete the CI test, select the level you completed from the **Levels** tab list.

10. Select the **Configure** button.



The Add/Configure CI Testing Level window will open.

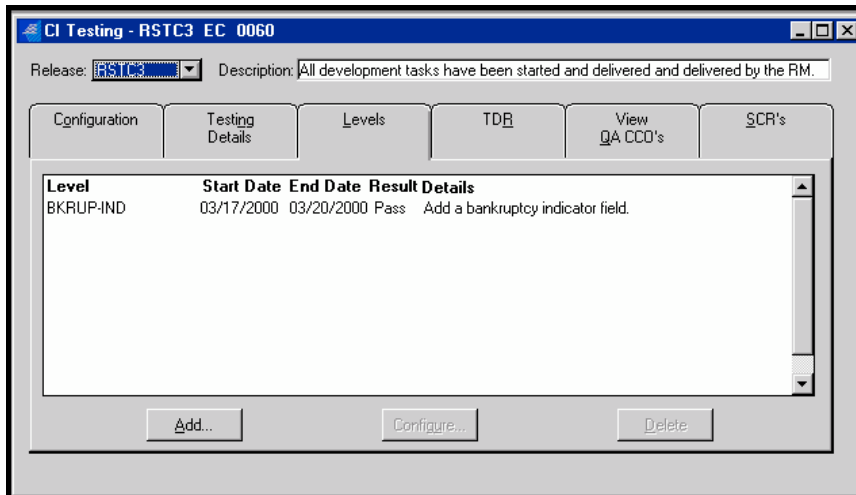


11. Enter the **End Date** for the CI test.
12. Select **Pass** or **Fail** from the **Result** drop-down list.
13. You can enter additional testing information in the **Details** field, if you wish.

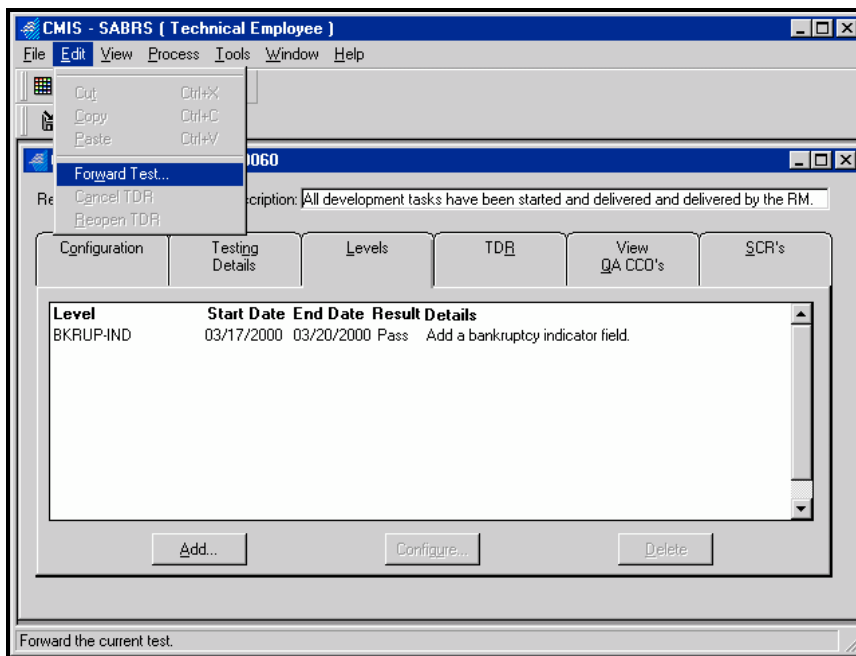
In this example, the CI test passed. The next section of this chapter addresses the steps to follow for a CI test failure.

14. Select the **Save** button.

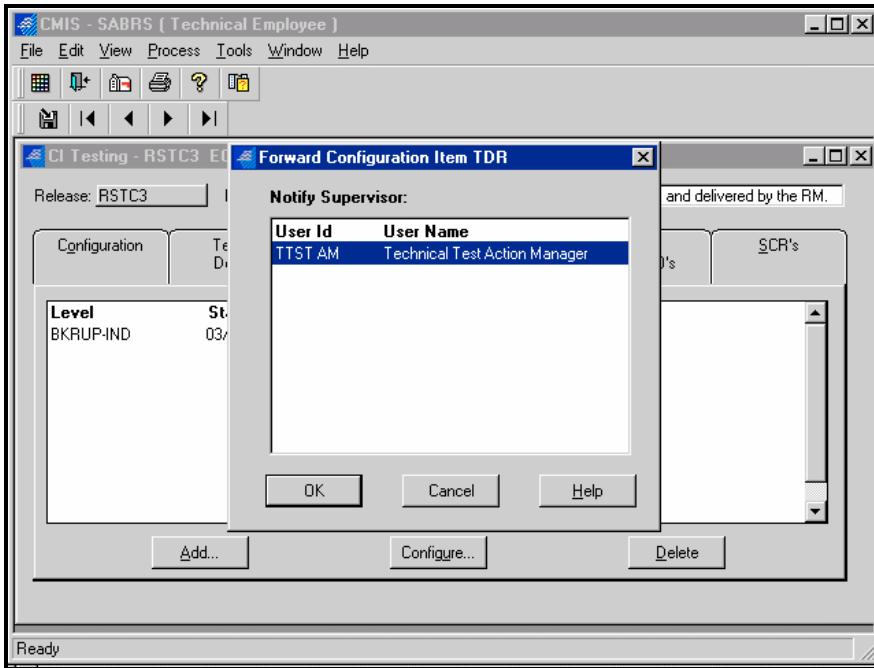
The Add/Configure CI Testing Level window will close. The CI Testing window will display the completed test results.



15. You are ready to forward the CI test. Select **Forward Test** from the **Edit** menu.



The Forward CI Test window will open.



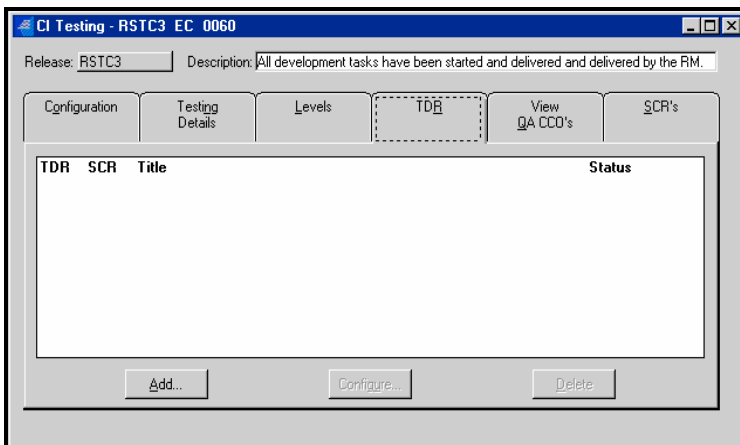
16. Select the test you wish to forward, then select **OK**

CMIS will forward your test results to the Technical Test Action Manager, and you will receive a message confirming that the test results were forwarded.

■ Steps for Creating a CI Test Deficiency Report (TDR)

To create a new TDR, the CI must have a QA start test date.

1. Select the CI Testing window **TDR** tab, then select the **Add** button.



The Add/Configure CI Test Deficiency Report window opens.

The TDR ID is a system-generated number. TDR's are numbered sequentially for the selected CI delivery.

2. Enter the **SCR** number. When creating a TDR, you must enter an **SCR** number.
3. Select the desired value from the **Criticality** drop-down list. This value indicates the relative importance of the CI to the release. Valid values are **Non-Critical**, **Critical**, and **Emergency**. When creating a TDR, **Criticality** is a required value.
4. Select the desired value from the **Deficiency** drop-down list. This value indicates the nature of the CI's deficiency as revealed by CI testing. Valid values include **Functional**, **Technical**, **Test Configuration**, and **Documentation**. When creating a TDR, a value is required for **Deficiency**.
5. If you wish, you can enter a description of the problem as revealed by testing in the **Problem** field.
6. Select the **Save** button.

After you save the TDR, the Add/Configure CI Test Deficiency Report window will close. You can forward the test results to the Technical Test Action Manager.

■ Steps for Modifying a CI TDR

When attempting to modify a TDR, access to edit individual fields will depend on the status of the TDR.

1. Select the CI Testing window **TDR** tab.
2. Select the TDR you wish to modify, then select the **Configure** button.

The Add/Configure CI Test Deficiency Report window will open.

3. Make the desired changes.
4. Select the **Save** button.

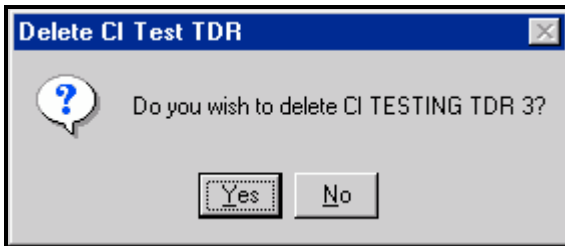
After saving your changes, you can forward the TDR to the Technical Test Action Manager for processing.

■ Steps for Deleting a CI TDR

The option to delete a TDR is only available before the Technical Test Action Manager closes the CI test and the rewrite CCO's are generated.

1. Select the CI Testing window **TDR** tab.
2. Select the TDR you wish to delete.
3. Select the **Delete** button.

A message will ask you to confirm the deletion.



4. Select **Yes** to confirm the delete action.

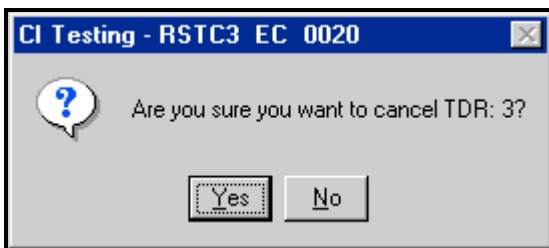
CMIS will delete the CI test TDR. The TDR will no longer display in the CI Testing window list.

■ Steps for Canceling a CI TDR

You can cancel a TDR at any time. If you cancel a TDR after the Technical Test Action Manager has closed the CI test and the rewrite CCO's have been generated, CMIS automatically will delete the rewrite CCO's.

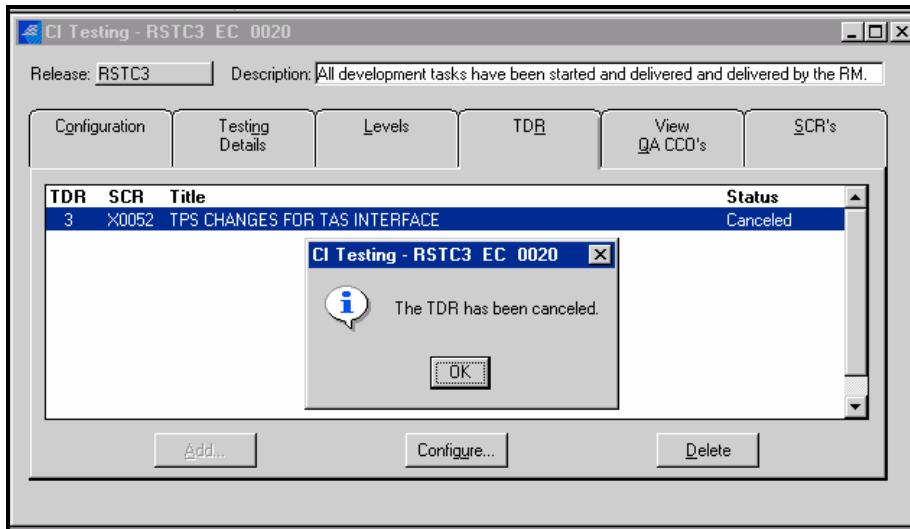
1. Select the CI Testing window **TDR** tab.
2. Select the TDR you wish to cancel.
3. Select **Cancel TDR** from the **Edit** menu.

A message will ask you to confirm the TDR cancellation.



4. Select **Yes** to confirm the cancellation action.

A message will inform you that the TDR was canceled. The TDR status will change to **Canceled**.



5. Select **OK** to acknowledge the message.

The TDR will remain canceled until a user deletes or reopens it.

Chapter 16 - SCR Testing Window



Overview

This chapter provides information on system change request (SCR) testing. SCR testing checks a piece of a system to ensure all requirements of the SCR have been met. Authorized CMIS users can record, view, and maintain information on SCR tests.

The System Change Request Testing window has three tabs: **Configuration**, **Events**, and **TDR**. The **Configuration** tab provides information on SCR tests. From the **Configuration** tab users can select an SCR test for which they want to add, modify, or view testing information. The **Events** tab contains data on SCR test events. An SCR test event is a testing scenario that validates the functionality of an SCR. The **TDR** tab provides information on test deficiency reports (TDR's).

The SCR must have an **Approved Locked** status before a user can start an SCR test. The process begins when a testing technical Employee starts an SCR test and creates one or more test events. If the SCR passes the test, the tester enters the test results, ends the test event(s), and ends the SCR test. If testing reveals a problem, the tester documents the problem in a TDR and forwards the TDR to the testing technical AM. The testing AM forwards the TDR to the development technical AM. The development technical AM or a user in that AM's structure will identify the configuration items (CI's) that caused the discrepancies and generate rework configuration change orders (CCO's). The developer (usually a technical Employee) who is assigned to a rework CCO starts and delivers the CCO via the Configuration Item Start/Deliver window. The Release Manager (RM) takes the necessary steps to restore the changed CI to a testable state and copies the appropriate files to the desired location. The development AM returns the TDR to the testing AM, who sends the TDR to the originating tester for retesting. This cycle of returning the TDR to the developer for rework and returning the reworked TDR to the tester continues until the tester finds no problems and designates the TDR as **Fixed**.

Restrictions

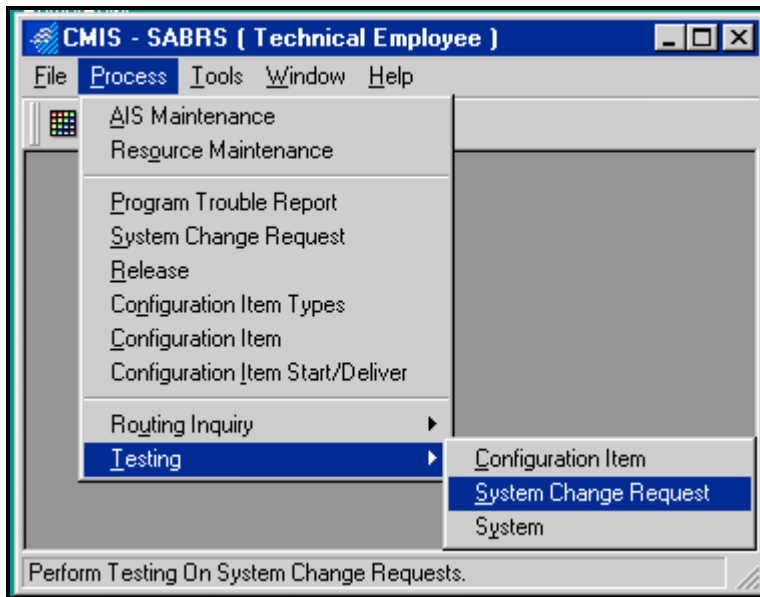
- SCR testing processes are not available to Remote User and Higher Authority user types.

System Change Request Testing Window Options

- **Start SCR Test and Create/Modify an SCR Test Event**
- **Create/Modify an SCR TDR**
- **Testing Technical Employee Forward SCR TDR to the Testing Technical Action Manager**
- **Testing Technical AM Forward SCR TDR to Development Technical Action Manager**
- **Add/Modify SCR TDR Routing Data**

- **Add/Modify SCR TDR CI's and Generate CCO's**
- **Return TDR to Action Manager**
- **Close a TDR**
- **Close an SCR Test Event and End an SCR Test**

1. From the **Process** menu, select **System Change Request** from the **Testing** submenu to open the System Change Request Testing window.



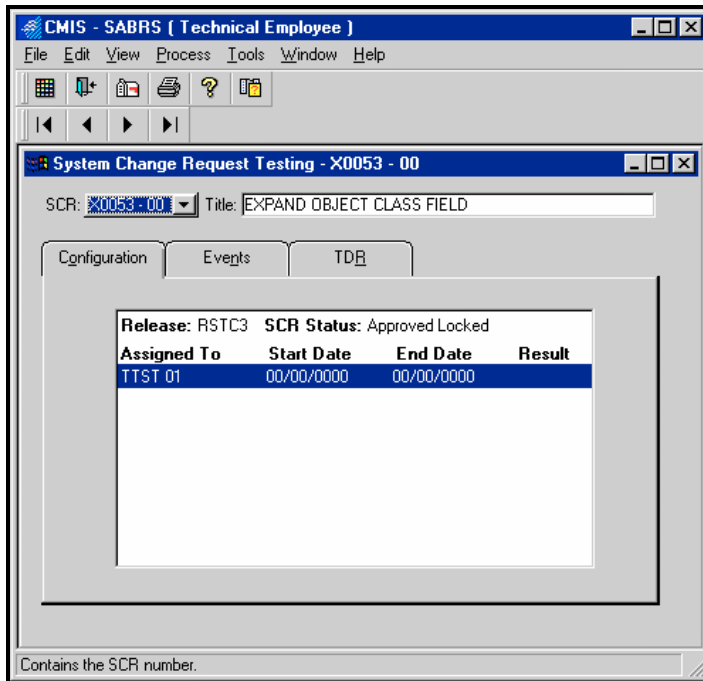
The System Change Request Testing window opens.

■ **Steps for Starting an SCR Test and Creating/Modifying an SCR Test Event**

You can start SCR tests only for SCR's with a status of **Approved Locked**. Before you can start an SCR test, an associated **QA** (quality assurance) **## SCR Test** CCO must exist. The double pound sign (##) CI type code indicates a quality assurance CCO. Starting an SCR test is a simple matter of entering a start date for the test.

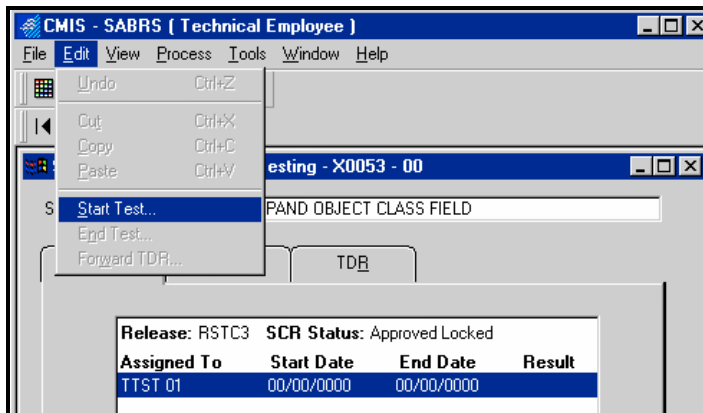
NOTE SCR's that do not have an associated **QA ## SCR Test** CCO will not display in the System Change Request Testing window **SCR** drop-down list.

1. On the System Change Request Testing window, select the desired SCR from the **SCR** drop-down list, then verify the **SCR Status** value is **Approved Locked**.

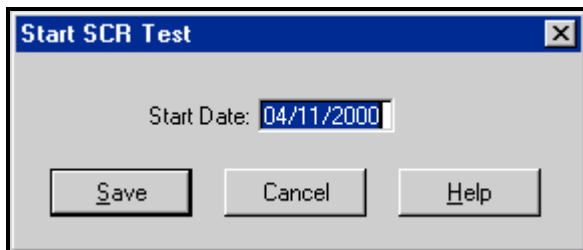


NOTE If the SCR's status is other than **Approved Locked**, the **Edit** menu **Start Test** item will be disabled.

2. Select **Start Test** from the **Edit** menu.



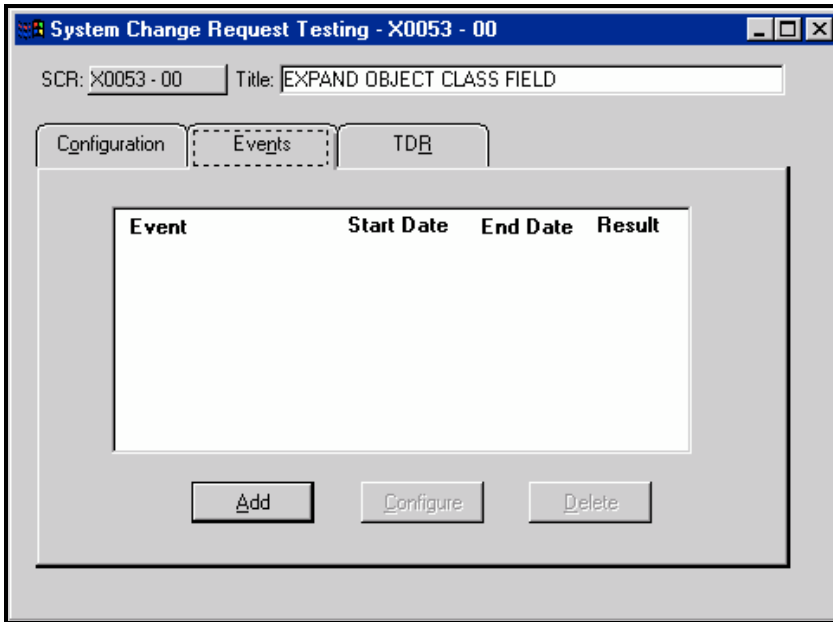
The Start SCR Test window opens.



3. The **Start Date** field defaults to the current date but you can modify this date if you wish.
4. Select the **Save** button.

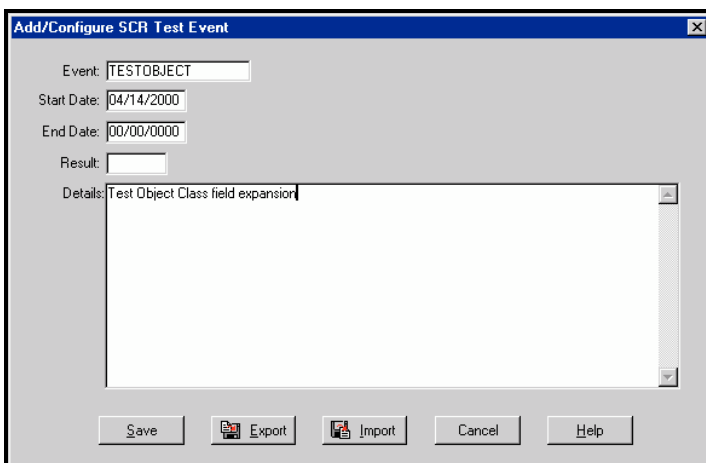
The Start SCR Test window will close. Next you will create a new event for the SCR test you just started. You can create a new SCR test event before starting an SCR test but there must be an existing **QA ## SCR Test CCO** before you can do so. If you create an event before you start the SCR test, after you start the test you must start the associated test event by entering the event **Start Date** on the Add/Configure SCR Test Event window.

5. Select the System Change Request Testing window **Events** tab.



6. Select the **Add** button.

The Add/Configure SCR Test Event window opens.



7. In the required **Event** field enter a code of up to 12 characters that identifies the testing event.
8. The **Start Date** field defaults to the current date. You can change the default value if you wish.

9. Enter a description of the test event in the required **Details** field.

You can export **Details** text to an external text file by selecting the **Export** button or import text into **Details** from an external text file by selecting the **Import** button.

10. Select **Save** to save the new event.

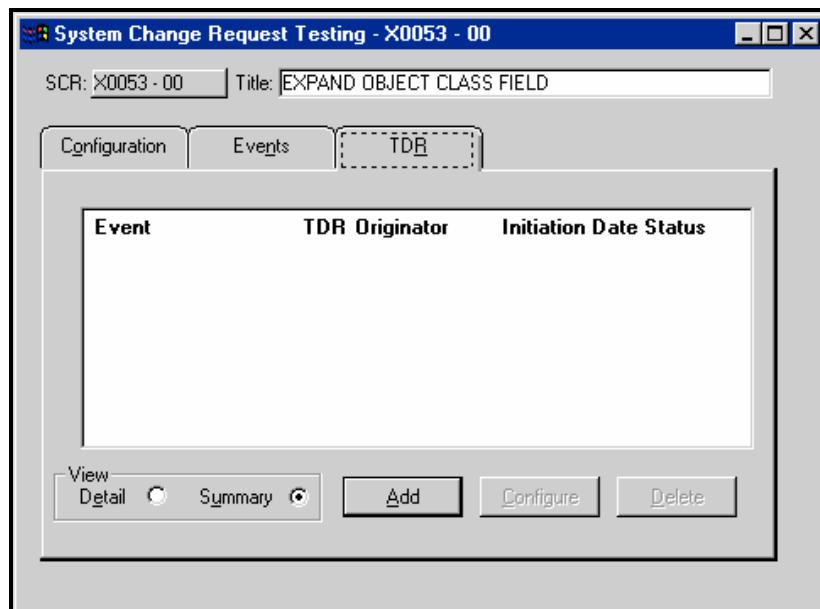
11. After you select **Save**, the Add/Configure SCR Test Event window will close. The new test event will display on the System Change Request Testing window **Events** tab list. You will enter values for the **End Date** and **Result** fields when you complete the SCR test.

12. To modify an SCR test event, select the desired event on the System Change Request Testing window **Events** tab. Select the **Configure** button. When the Add/Configure SCR Test Event window opens, change the desired data and select the **Save** button.

13. To delete an SCR test event, select the event you wish to delete then select the **Delete** button.

■ Steps for Creating/Modifying an SCR TDR

1. When testers encounter problems during SCR testing, they record these problems in TDR's (TDR's) via the System Change Request Testing window **TDR** tab.
2. On the System Change Request Testing window, select the desired SCR from the **SCR** drop-down list.
3. Select the **TDR** tab.



F
i
g

4. Select the **Add** button.

The Add/Configure SCR Test Deficiency Report window opens.

5. CMIS will generate the **TDR ID** when you save the new TDR. When you create a new TDR, the **Status** field defaults to **Initiated**, and the **Initiation Date** defaults to the current date.
6. Select the desired event from the **Event** drop-down list.
7. Select the ID of the user responsible for the TDR from the **Originator** drop-down list.

NOTE When a user creates a TDR, the **Originator** field defaults to the current user. Action Managers (AM's) and Action Manager-Change Coordinators (AM-CC's) can assign users in their structure as the TDR originator. Configuration Managers can assign any member of the AIS as the TDR originator.

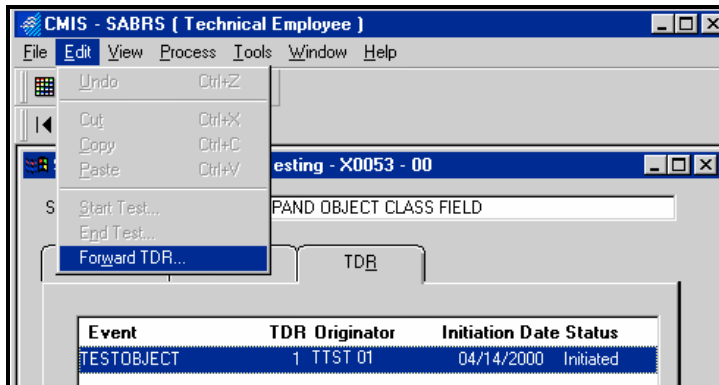
8. In the required **Details** field, enter information about the TDR. You can import and export **Details** text. To export the text select the **Export** button. To import an external text file, select the **Import** button.
9. Select the **Save** button
- 10.
11. After you save the new TDR, CMIS assigns a sequential number to the new TDR and the Add/Configure SCR Test Deficiency Report window closes. The new TDR displays on the **TDR** tab.

Steps for Forwarding an SCR TDR to the Testing Technical Action Manager

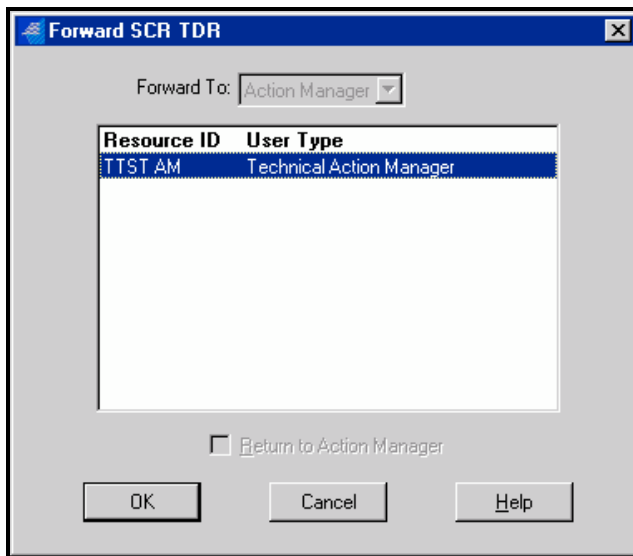
If the testing technical Employee performs SCR testing and encounters a problem, the tester creates a TDR to record the problem. No work can be done to correct the problem until the tester forwards the TDR to the testing technical AM, who will forward the SCR to the development technical AM.

1. Select the System Change Request Testing window **TDR** tab.

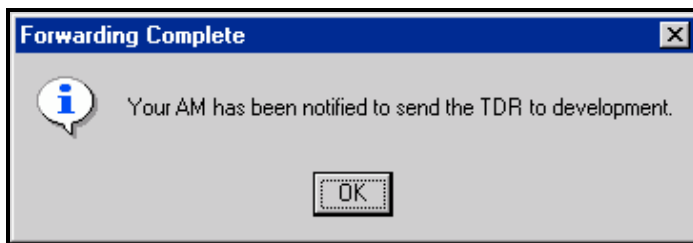
2. Select the TDR you wish to forward.
3. Select **Forward TDR** from the **Edit** menu.



The Forward SCR TDR window opens.



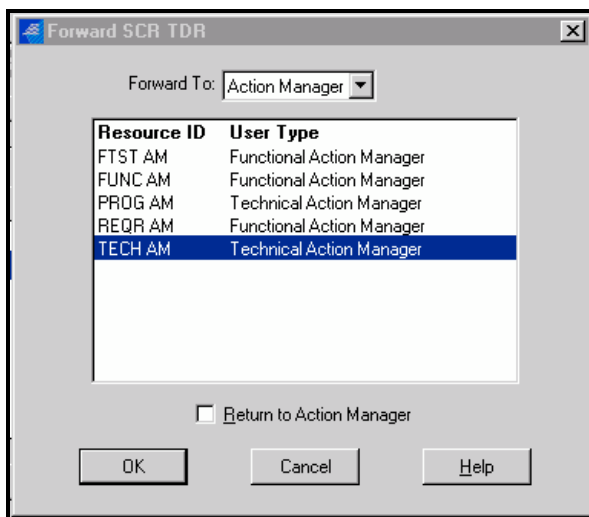
4. The only forwarding option available to the testing Employee who originated the TDR is to forward the TDR to their testing AM.
5. Select the **OK** button.
6. After you select the **OK** button, CMIS confirms the forwarding is complete. CMIS also generates a mail message to notify the AM of the forwarded TDR.



7. Select **OK** on the message confirming the TDR forwarding.

■ Steps for Testing AM Forwarding a TDR to the Development AM

1. When a testing technical Employee creates a TDR and sends the TDR to the testing technical AM, the testing AM will forward the TDR to the development technical AM. The development resources will correct the appropriate CI's and eventually return the TDR to the testing resources.
2. Select the System Change Request Testing window **TDR** tab.
3. Select the TDR you are going to forward to the development technical AM.
4. Select **Forward TDR** from the **Edit** menu.
5. The Forward SCR TDR window will open. The testing technical AM's forwarding options on the Forward SCR TDR window differ from the testing technical Employee's.



**F
i
g**

6. The **Forward To** drop-down list defaults to **Action Manager**. For initially forwarding the TDR to the development AM, you will use the default selection.
7. If you were forwarding the TDR for another reason, you could select **Employee** from the **Forward To** drop-down list to access a list of Employees and Release Managers to whom you could forward the TDR.
8. Select the resource to whom you are forwarding the TDR from the **Resource ID** and **User Type** list. In this case, you would select the resource ID of the development technical AM.
9. Select the **OK** button.

■ Steps for Creating/Modifying SCR TDR Routing Data

The SCR TDR window **Routing** tab lets authorized users view TDR routing information.

NOTE Only Configuration Manager and Technical Supervisor user types can create and modify TDR routing data.

12. Select the System Change Request Testing window **TDR** tab.
13. Select the TDR for which you wish to add routing data.
14. Select the **Configure** button.

The Add/Configure SCR Test Deficiency Report window opens.

15. Select the **Routing** tab.

From	To	Sent Date	Return Date
TTST AM	TECH AM	04/06/2000	00/00/0000

16. Select the **Add** button.

The Add/Configure SCR TDR Routing window opens.

17. Select the resource creating the routing from the **From** drop-down list.
18. Select the resource to whom the SCR TDR was routed from the **To** drop-down list.

NOTE User types Higher Authority and Remote User cannot receive SCR TDR routings.

19. Enter the date the SCR TDR was routed in the required **Date Sent** field.
20. The **Notes** field contains information added by the resource that received the SCR TDR. The **Date Returned** field contains the date the SCR TDR was returned from routing.
21. Select the **Save** button.
22. The Add/Configure SCR Routing window closes.
23. After you save TDR routing information, you can modify this data when necessary. To modify routing data, select the Add/Configure SCR Test Deficiency Report window **Routing** tab, select the routing you wish to modify, then select the **Configure** button. The Add/Configure SCR TDR Routing window reopens. Modify the routing data as desired, then select the **Save** button to save your changes.

■ Steps for Adding/Modifying SCR TDR CI's and Generating CCO's

1. After the testing technical AM forwards the SCR TDR to the development technical AM, the development AM may identify the configuration items (CI's) that caused the discrepancies and generate rework configuration change orders (CCO's) or forward the TDR to an Employee in their structure to perform these tasks. The Add/Configure SCR TDR Configuration Item window allows authorized users to identify and record information on the CI's causing the testing deficiency.
2. Select the System Change Request Testing window **TDR** tab.
3. Select the TDR for which you are going to identify CI's.
4. Select the **Configure** button.
5. The Add/Configure SCR Test Deficiency Report window opens.

F
i

6. Select the **CI** tab.

7. Select the **Add** button.

The Add/Configure SCR TDR Configuration Item window opens.

8. Select the applicable two-character CI type code from the **CI Type** drop-down list.
9. Select the CI name from the **Name** drop-down list.
10. From the **Assign To** drop-down list select the resource assigned to work on the CI.
11. In the **Estimated Hours** field enter the estimated number of work hours anticipated for fixing this CI.
12. Select the **Save** button.
13. The Add/Configure SCR TDR Configuration Item window closes.
14. You can modify the SCR TDR CI data until you generate the CCO. To modify SCR TDR CI data, select the desired SCR TDR CI on the Add/Configure SCR Test Deficiency Report window, then select the **Configure** button. When the Add/Configure SCR TDR CI window opens, modify the desired data, then select the **Save** button. To delete an SCR TDR CI, select the desired CI then, select the **Delete** button.

After identifying the CI's necessary to correct the TDR, you need to generate CCO's. Selecting the **Generate** button will generate the CCO's. If you have identified a TDR CCO that already exists for the release, selecting the **Generate** button will create a rework CCO. If you have identified CCO's that do not exist for the release,

selecting the **Generate** button will create development CCO's. In addition, matching QA CCO's are created if the associated CI is configured for automatic generation of QA CCO's. When you generate CCO's for the TDR, CMIS will generate a CCO for each listed CI that belongs to the current user. If the current user is an AM and generates CCO's, CMIS will generate CCO's for all listed CI's assigned to Employees in that AM's structure.

Configuration Item	Assign To	Estimated Hours	CCO Generated
PC 0010	TECH 01	2	<input type="checkbox"/>

15. Select the **Generate** button.

16. The SCR Testing Generate Results window opens, indicating you generated a CCO.

Results
CCO generated for CI: PC 0010 TECH 01.

17. Select the **Close** button to close the SCR Testing Generate Results window.

18. On the Add/Configure SCR Test Deficiency Report window, the **CCO Generated** check box for the SCR TDR CI will be checked, indicating a CCO has been created for the CI.

Configuration Item	Assign To	Estimated Hours	CCO Generated
PC 0010	TECH 01	2	<input checked="" type="checkbox"/>

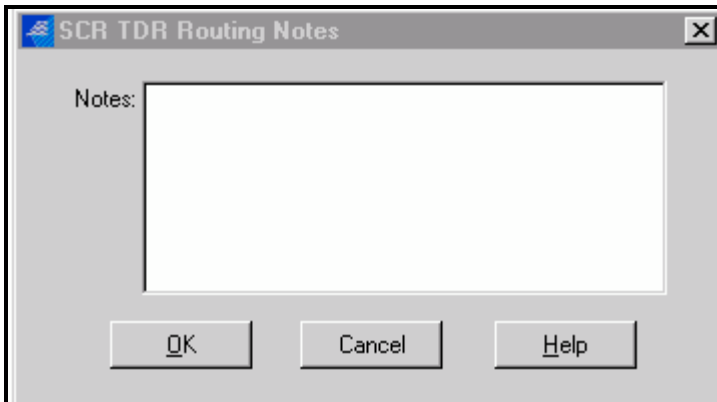
19. After identifying the SCR TDR CI(s) and generating the CCO(s), the developer is ready to begin correcting the CI. The developer starts the CCO, fixes the problem, then delivers the CCO via the CI Start/Deliver window. After delivering the CCO, the developer returns the SCR TDR to the development technical AM who will return the TDR to the testing technical AM.

■ Steps for Returning the SCR TDR to the Testing AM

When the development technical Employee has returned the fixed CCO to the development technical AM, the development AM will return the TDR to the testing technical AM. Upon receipt of the returned TDR, the testing AM will return the TDR to the tester for retesting.

1. Select the System Change Request Testing window **TDR** tab.
2. Select the TDR you are going to return to the testing technical AM.
3. Select **Forward TDR** from the **Edit** menu.
4. The Forward SCR TDR window will open.
5. Select the **Return to Action Manager** check box to return the TDR to the AM who forwarded the TDR.
6. Select the **OK** button.

7. The SCR TDR Routing Notes window will open.



8. Enter any applicable notes about the TDR, then select the **OK** button to save the text and return the TDR to the testing AM.

■ **Steps for Closing an SCR TDR**

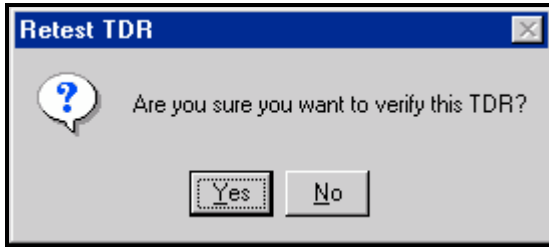
1. There are two ways to close an SCR TDR. After a successful retest the tester can designate the TDR as **Fixed** by entering a **Retest Date**. Also, users can cancel a TDR by entering a value in the Add/Configure SCR Test Deficiency Report window **Cancellation Date** field.
2. When the TDR is returned to the testing AM, CMIS automatically generates a value for the Add/Configure SCR Test Deficiency Report window **Returned Date** field. When the tester retests and finds no problems, the tester enters the retest date in the **Retest Date** field. The **Status** value will update automatically to **Fixed** and a **Reopen** button will appear on the SCR Test Deficiency Report window. The **Reopen** button allows a user to reopen a closed TDR, if necessary. Selecting the **Reopen** button will change the TDR's status from **Fixed** to **Returned**. If you discover the TDR is invalid for some reason, you can cancel the TDR by entering a value in the **Cancellation Date** field.
3. The steps for closing a TDR after a successful retest follow.
4. Select the System Change Request Testing window **TDR** tab.

5. Select the TDR you have successfully retested.
6. Select the **Configure** button.

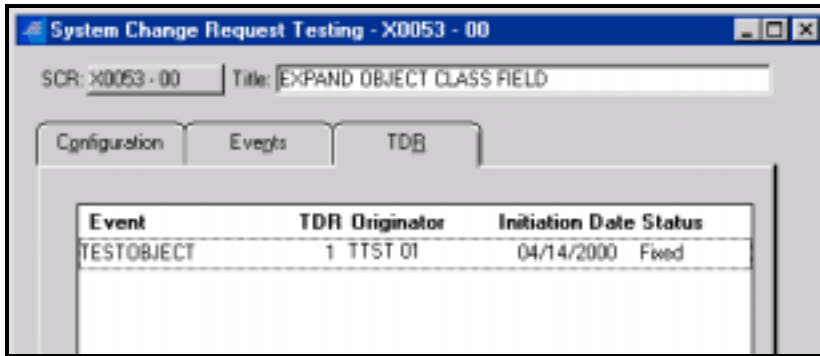
The Add/Configure SCR Test Deficiency Report window opens.

7. Enter the retest date in the **Retest Date** field.
8. Select the **Save** button.

9. After you select **Save**, CMIS will prompt you to confirm the TDR has been resolved.

F
i
g

10. Select **Yes** to confirm the TDR verification.

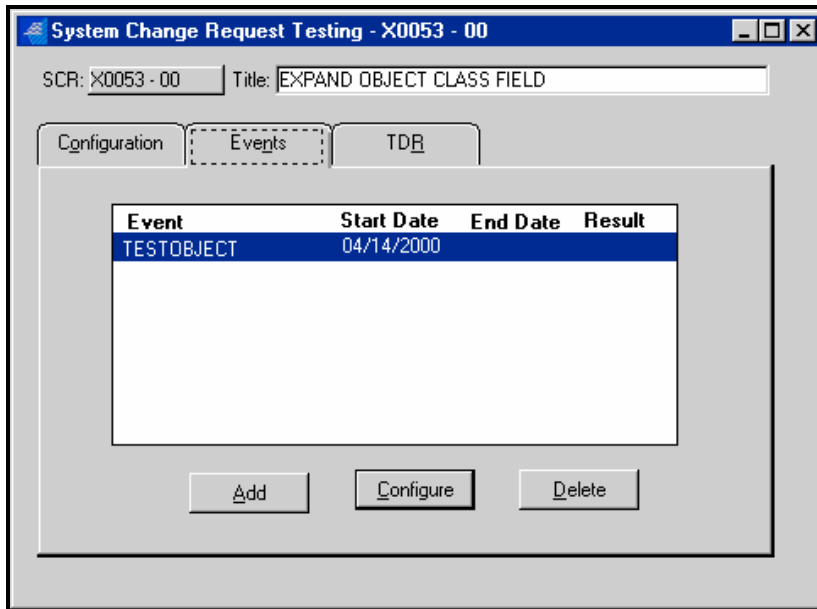


F

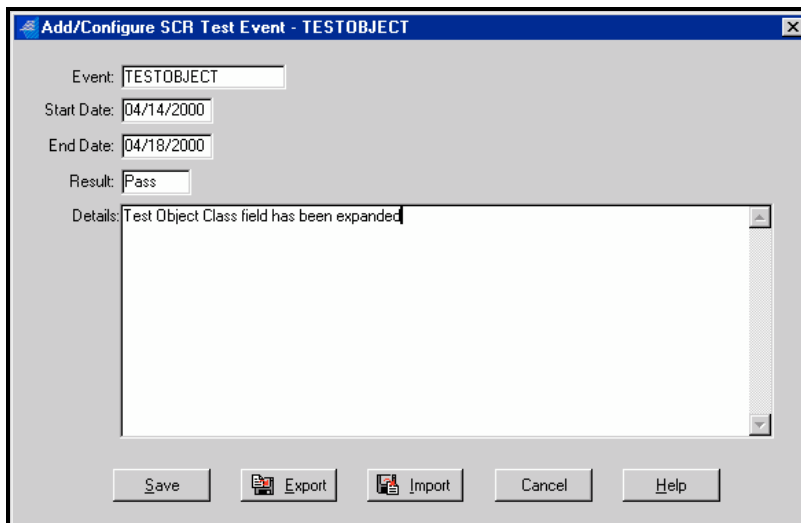
If you need to reactivate a **Fixed** TDR, select the desired TDR then select the **Configure** button. The Add/Configure Test Deficiency Report window will display a **Reopen** button. Selecting the **Reopen** button will change the status of the TDR to **Initiated**.

■ Steps for Closing the Test Event and Ending the SCR Test

1. After successfully retesting and closing the TDR, the testing technical Employee is ready to close the test event and end the SCR test.
2. Select the System Change Request Testing window **Events** tab.
3. Select the test event you are closing.

F
i
g

4. Select the **Configure** button.
5. The Add/Configure SCR Test Event window opens
6. Enter the date the TDR was successfully retested in the **End Date** field.



7. Select the desired value from the **Result** drop-down list. In this example, the test passed so you would select **Pass**.
8. Enter the desired information in the required **Details** field.
9. Select the **Save** button.

The Add/Configure SCR Test Event window closes. The System Change Request Testing window **Events** tab now shows the updated **End Date** and **Result** for the test event.

The screenshot shows a window titled "System Change Request Testing - X0053 - 00". At the top, there are two input fields: "SCR: X0053 - 00" and "Title: EXPAND OBJECT CLASS FIELD". Below these are three tabs: "Configuration", "Events", and "TDR". The "Events" tab is selected. It contains a table with the following data:

Event	Start Date	End Date	Result
TESTOBJECT	04/14/2000	04/18/2000	Pass

Below the table are three buttons: "Add", "Configure", and "Delete".

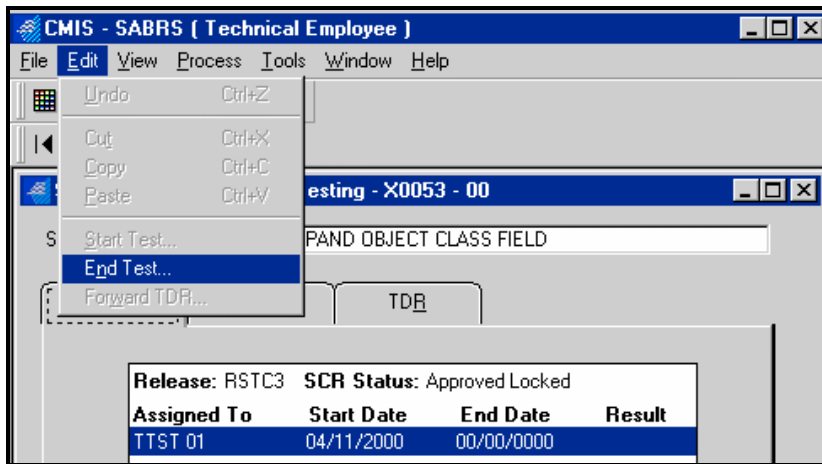
10. Select the **Configuration** tab.
11. Select the SCR test you are going to end.

The screenshot shows the same window as before, but the "Configuration" tab is now selected. It displays the following information:

Release: RSTC3 SCR Status: Approved Locked

Assigned To	Start Date	End Date	Result
TTST 01	04/11/2000	00/00/0000	

12. Select **End Test** from the **Edit** menu.



The End SCR Test window opens.

The 'End SCR Test' dialog box contains the following fields and buttons:

- Start Date: 04/11/2000
- End Date: 04/18/2000
- Result: Pass
- Estimated Hours: 1
- Actual Hours: 1
- Estimated Size of Change: 0
- Actual Size of Change: 1
- Buttons: Save, Cancel, Help

13. Enter the date the TDR was successfully retested in the **End Date** field.

14. Select **Pass** or **Fail** from the **Result** drop-down list.

15. Enter the number of hours used to correct the TDR in the **Actual Hours** field.

16. Select the **Save** button.

The End SCR Test window closes. The System Change Request Testing window **Configuration** tab now displays the **End Date** and **Result** for the SCR test.

The screenshot shows a window titled "System Change Request Testing - X0053 - 00". Inside, there are two input fields: "SCR: X0053 - 00" and "Title: EXPAND OBJECT CLASS FIELD". Below these are three tabs: "Configuration" (which is selected), "Events", and "TDR". The main content area displays the following information:

Release: RSTC3 **SCR Status:** Approved Locked

Assigned To	Start Date	End Date	Result
TTST 01	04/11/2000	04/18/2000	Pass

Chapter 17 - System Testing



Overview

The System Testing window allows users to record, view, and maintain information on release testing. The System Testing window has three tabs: **Configuration**, **Events**, and **TDR**. Users can create system testing templates via the System Testing Template Maintenance window.

Configuration Tab

Provides information on the selected release's tests. From the **Configuration** tab users can select a test level for which they want to add, modify, or view testing information.

Events Tab

Contains data on the selected test's events.

TDR Tab

Provides information on selected test deficiency reports (TDR's).

The System Testing Template Maintenance window contains two tabs: **Levels** and **Events**.

Levels Tab (System Template Window)

Lists available system test level templates and the number of associated system test event templates.

Events Tab (System Template Window)

Lists the available system test event templates.

Restrictions

- Resources who can modify general system testing data and start and end tests must be members of the relevant (AIS). System testing is not available to user types Remote User and Higher Authority.

R **System Testing Options**

Create/Modify a System Test

Create and Route a System Test Event

Modify a System Test Event

Start a System Test

Create a System Test Deficiency Report (TDR)

Modify a TDR

Forward a System TDR

Create/Modify TDR Routing

Add an SCR to a TDR, Identify Configuration Items (CI's), and Generate Configuration Change Orders (CCO's)

Transfer Test TDR's Between Levels

Close a TDR

End a System Test

Create a System Testing Event Template

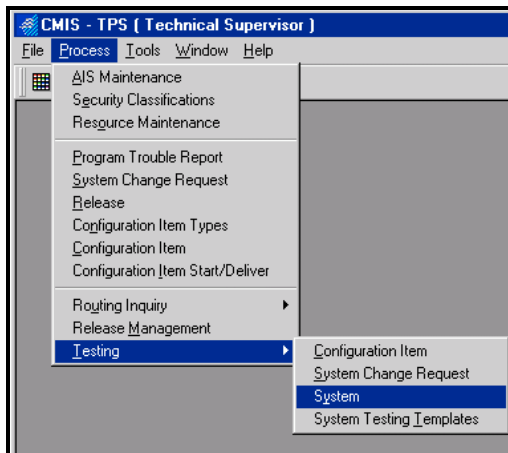
Create a System Testing Level Template

Create a New System Test Event Using a Template

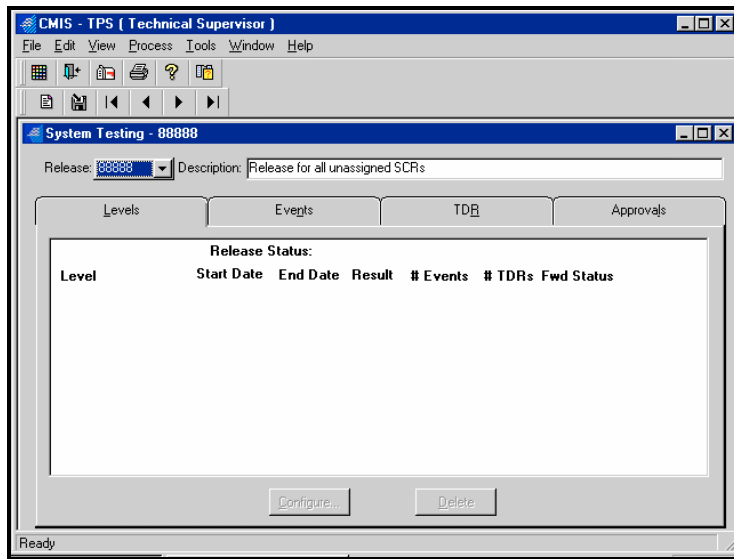
Create a New System Test Level Using a Template

Print System Test Reports

From the **Process** menu, select **System** from the **Testing** submenu to open the System Testing window.



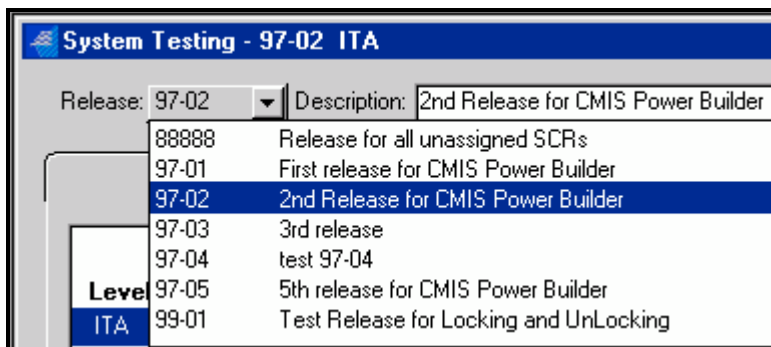
The System Testing Window opens.



■ Steps for Creating/Modifying a System Test

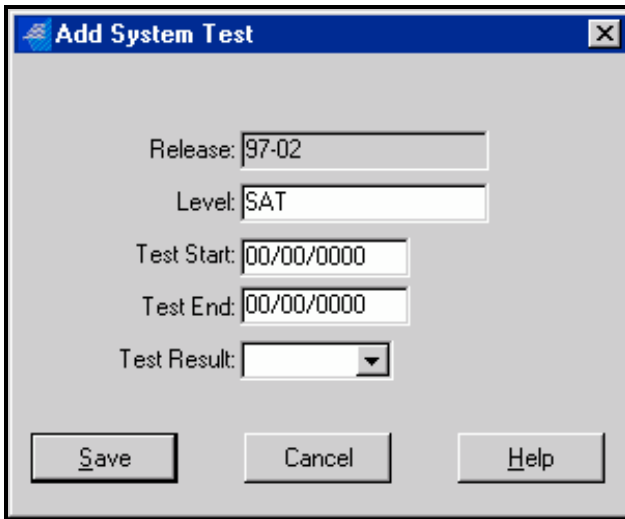
A release can contain one or more system testing levels. Users can only add levels to a locked release that is not certified.

1. On the System Testing window, select the desired release from the **Release** drop-down list.
2. Select the **New** toolbar button.



A message will ask if you wish to use a template to add the new test level. System testing templates are discussed in a later section. In this example, you are not going to use a template. Select the **No** button.

The Add System Test window opens.



The Add System Test dialog box contains the following fields and buttons:

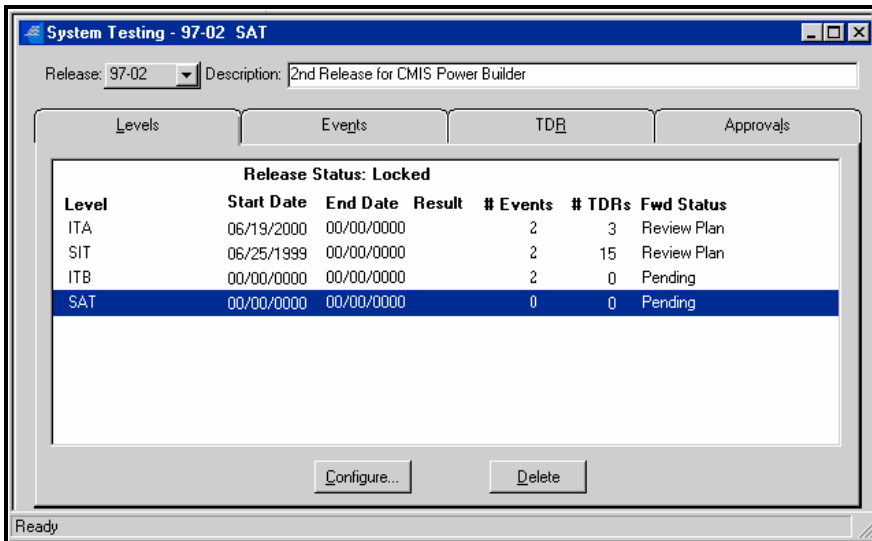
- Release: 97-02
- Level: SAT
- Test Start: 00/00/0000
- Test End: 00/00/0000
- Test Result: (dropdown menu)
- Buttons: Save, Cancel, Help

3. Enter a name for the new system test in the **Level** field.

The **Test Start** is the date the system test begins. You usually enter this date when you're actually ready to begin testing.

4. Select the **Save** button.

The new system test appears on the System Testing window **Levels**.



The System Testing - 97-02 SAT window displays the following information:

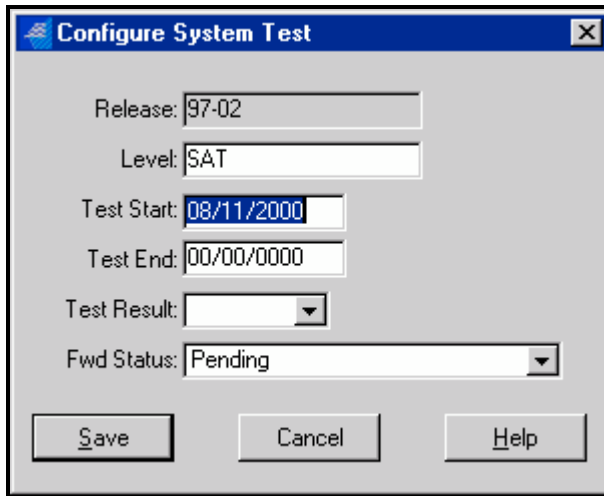
- Release: 97-02 (dropdown menu)
- Description: 2nd Release for CMIS Power Builder
- Tabs: Levels, Events, TDR, Approvals
- Release Status: Locked
- Table with columns: Level, Start Date, End Date, Result, # Events, # TDRs, Fwd Status
- Buttons: Configure..., Delete
- Status bar: Ready

Level	Start Date	End Date	Result	# Events	# TDRs	Fwd Status
ITA	06/19/2000	00/00/0000		2	3	Review Plan
SIT	06/25/1999	00/00/0000		2	15	Review Plan
ITB	00/00/0000	00/00/0000		2	0	Pending
SAT	00/00/0000	00/00/0000		0	0	Pending

If desired, you can modify existing testing level data.

5. Select the level you wish to modify and then select the **Configure** button.

The Configure System Test window opens.



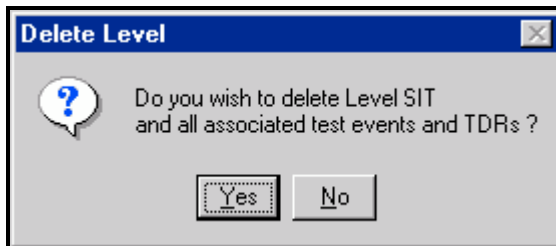
The 'Configure System Test' dialog box contains the following fields and controls:

- Release:** Text box with '97-02' entered.
- Level:** Text box with 'SAT' entered.
- Test Start:** Date picker showing '08/11/2000'.
- Test End:** Date picker showing '00/00/0000'.
- Test Result:** Dropdown menu.
- Fwd Status:** Dropdown menu showing 'Pending'.
- Buttons:** 'Save', 'Cancel', and 'Help' at the bottom.

**F
i
g**

6. Change the desired values.
7. Select the level you wish to delete, then select the **Delete** button.

A message prompts you to confirm the test level deletion. When you delete a test level, the level and all associated test events and TDR's also will be deleted.



The 'Delete Level' dialog box contains the following elements:

- Title:** 'Delete Level'.
- Message:** 'Do you wish to delete Level SIT and all associated test events and TDRs ?'.
- Buttons:** 'Yes' and 'No' at the bottom.

8. Select the **Yes** button if you're sure you want to delete the test level and all associated events and TDR's.

■ **Steps for Creating and Routing a System Test Event**

A test event is a testing scenario that validates the functionality of a release.

1. On the System Testing window **Levels** tab, select the desired level.
2. Select the **Events** tab.

3. Select the **Add** button.

A message asks if you wish to add an event using a template.

4. Select the **No** button.

The Add System Testing Event window opens.

5. In the **Event** field enter an event name of up to 12 characters.
6. From the **Assigned To** drop-down list, select the user assigned to the event.

NOTE You cannot start an event until the associated level has been started. You cannot start an event if the release is certified. To start or end an event the **Estimated Change Size** must contain a value if the AIS **Maximum Change size** contains a value.

7. Enter the number of hours estimated to complete the event in the **Estimated Hours** field.
8. Enter a value to indicate the estimated scope of the change in the **Estimated Change Size** field.

The **Priority**, **Change #**, **Sequence**, and **Record ID** fields do not have specific usage rules. CMIS Administrators can define these fields for specific uses within their AIS. For example, the **Priority** field could

identify test script priorities. The **Sequence** field could identify the transaction numbers, and the **Change #** field could identify specification numbers. The **Record ID** could be used as a unique identifier for a test field.

9. Select the **Details** tab and enter the desired information. When adding a system test event, you must make an entry in the **Details** text field.

Configure System Testing Event

Release ID: 97-02 Testing Level: SAT Event: TE001

Configuration Details Sub Event Approvals

Details: This information is for training purposes only.

Export Import

Save Cancel Work Fields Help

Select the **Import** button to import text from an external text file. To export the **Details** text to an external text file, select the **Export** button.

10. Select the **Save** button.

The newly created event appears in the **Events** tab list.

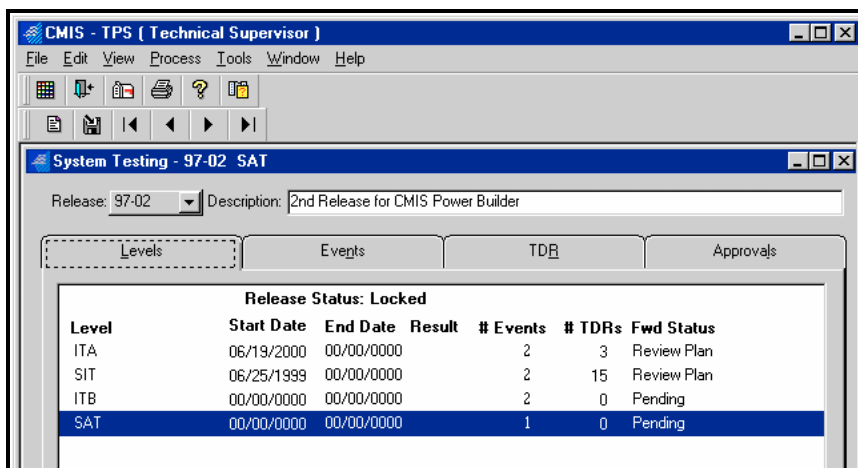
System Testing - 97-02 SAT

Release: 97-02 Description: 2nd Release for CMIS Power Builder

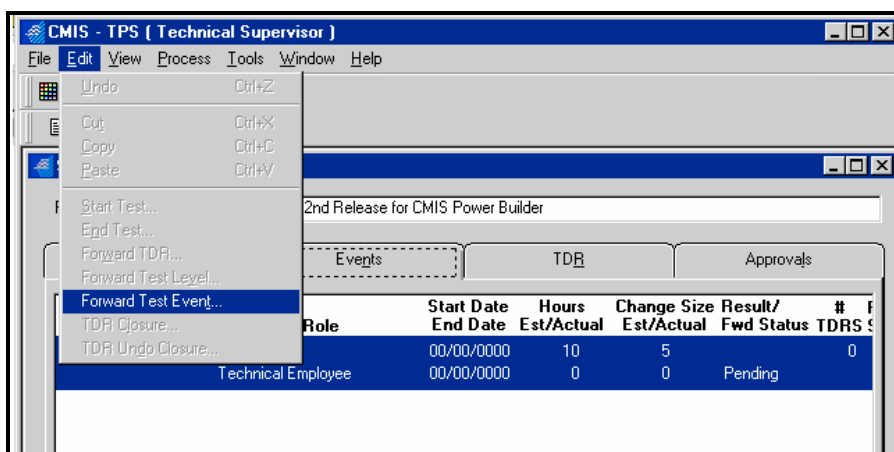
Levels Events TDR Approvals

Event	Assign To / Role	Start Date End Date	Hours Est/Actual	Change Size Est/Actual	Result/ Fwd Status	# F
TE001	PRDG01 Technical Employee	00/00/0000 00/00/0000	10 0	5 0	Pending	0

The **Levels** tab now shows the SAT test has one event.



11. To route a testing event to another user, select the desired event on **Events** tab.
12. Select the **Edit** menu **Forward Test Event** item.



The Forward System Testing Event window opens.

Resource ID	User Type
CM	Technical AM-CC
DATAAM	Technical Action Manager
FRANKIE	Technical Action Manager
FRANKIE 2	Technical Action Manager
FRANKIE 3	Technical Action Manager
FUNCAM	Functional Action Manager
PROGAM	Technical Action Manager
REQRAM	Functional Action Manager
TECHAM	Technical Action Manager
TESTAM	Technical Action Manager

13. From the **Purpose** drop-down list, select the purpose of the forwarding.
14. Select each **Resource ID** you wish to forward the event to.
15. Select the **OK** button.

A message confirms that the testing event has been forwarded.

■ Steps for Modifying a System Test Event

You can modify system test event information.

1. On the System Testing window **Events** tab, select the **Configure** button.

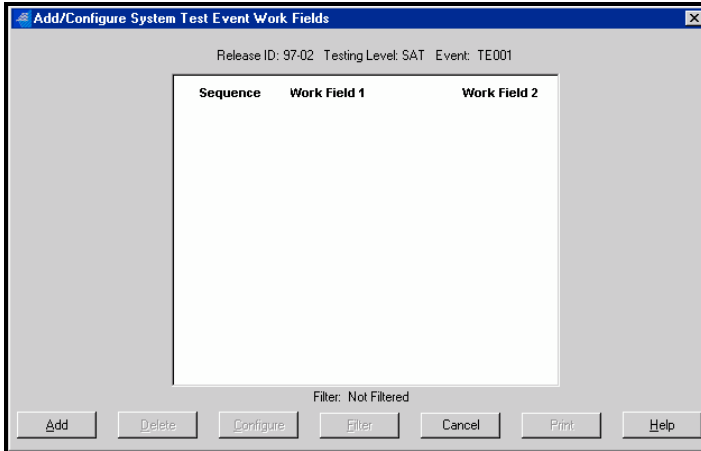
The Configure System Testing Event window opens.

Modify the desired information.

If your AIS uses the system testing Work Fields, you can add, modify, and delete Work Fields data via the Add/Configure System Test Event Work Fields window. CMIS provides Work Fields functionality but there are no specific usage rules. CMIS Administrators can define specific uses for Work Fields. For example, Work Fields could identify pages and columns in a decision logic table being tested.

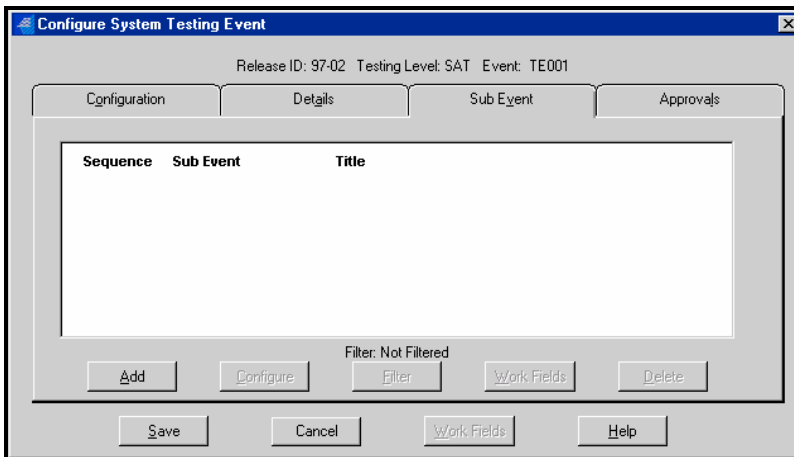
3. If you use Test Event Work Fields, select the **Work Fields** button.

The Add/Configure System Test Event Work Fields window will open.



F
i
g

The **Sub Event** tab data, like Work Fields, do not have specific usage rules. CMIS Administrators can customize usage of Sub Events data. For example, Sub Events could be used to identify a system component module being tested.



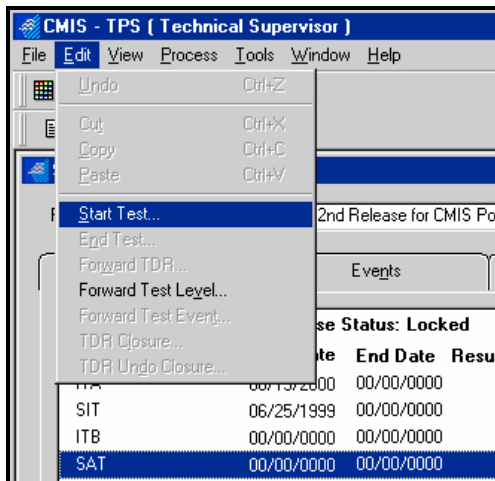
4. When you have made the desired changes on the Configure System Testing Event window, select the **Save** button.

■ Steps for Starting a System Test

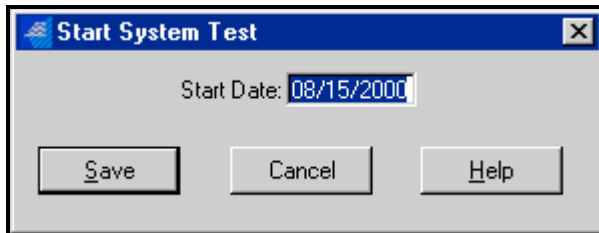
The Start Test action allows users to create a system test record.

1. On the System Testing window **Levels** tab, select the desired level.

2. Select **Start Test** from the **Edit** menu.



The Start System Test window opens.



3. Enter the test start date in the **Start Date** field.
4. Select the **Save** button.

A message notifies you of open development CCO's and ask you to confirm the start test action.



5. Select the **Yes** button to start the test.

■ Steps for Creating a System Test Deficiency Report (TDR)

The System Testing window **TDR** tab allows users to create, delete, forward, and view TDR's for the selected release test. Any resource who is a member of the current AIS can create TDR's. Resources who can modify TDR's include the TDR originator, users in the originator's structure, and Configuration Manager user types.

1. On the System Testing window, select the desired release from the **Release** drop-down list.

2. Select the desired system level test.
3. Select the **TDR** tab.

System Testing - 97-02 SAT

Release: 97-02 Description: 2nd Release for CMIS Power Builder

Levels Events **TDR** Approvals

Event	TDR	Originator	Role	Initiation Date	Status	Repeat Indicator

☐ View All

View Detail Summary Add... Configure... Delete

Ready

4. Select the **Add** button.

The Add System TDR window opens.

Add System TDR

Release ID: 97-02 Testing Level: SAT

Configuration Details Resolution Routing SCR X-Ref

TDR ID: 000 Status: Initiated

Event: TE001 Originator: SUPERVISOR Technical Supervisor

Initiation Date: 08/15/2000 Returned Date: 00/00/0000

Retest Date: 00/00/0000 Converted Date: 00/00/0000 to SCR: SCR

Cancellation Date: 00/00/0000 Transferred Date: 00/00/0000

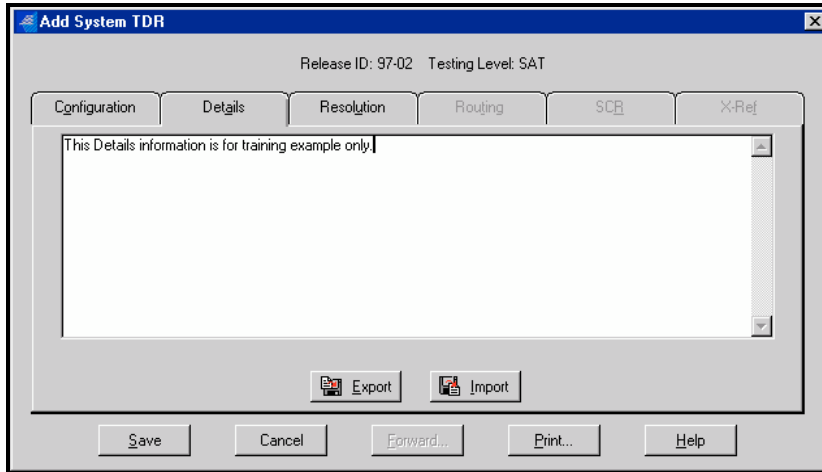
Priority: Moderate Criticality: Moderate

Suspected Origin: CM/RM Actual Origin: Unknown

Save Cancel Forward... Print... Help

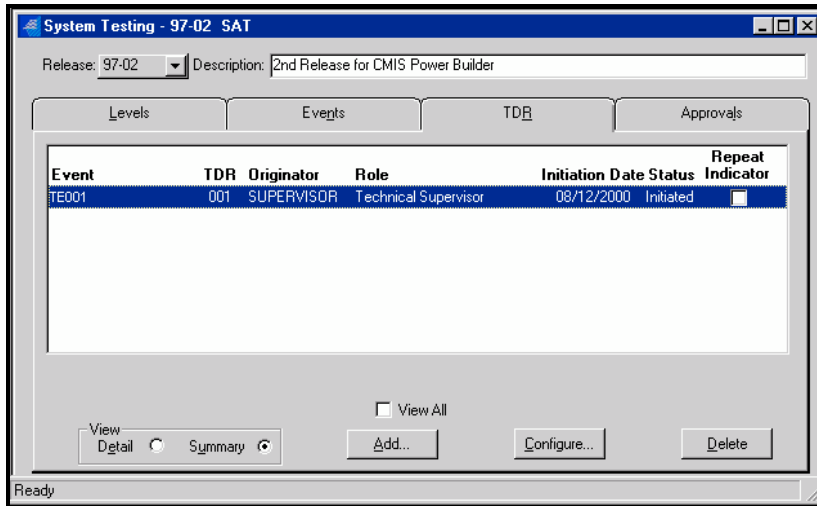
5. Select the desired event from the **Event** drop-down list.
6. Select the desired user ID from the **Originator** drop-down list.
7. The initiation date is the date the TDR was created. It defaults to the current date. If necessary, you can enter a different date in the **Initiation Date** field.
8. Select the desired value from the **Priority** drop-down list. The **Priority** value ranks the importance of the TDR in comparison with other TDR's. A value is required.
9. Select the desired value from the **Criticality** drop-down list. The **Criticality** value indicates the relative importance of the TDR. A value is required.
10. Select the suspected origin of the deficiency from the **Suspected Origin** drop-down list. If you know the actual origin of the deficiency, select the TDR origin from the **Actual Origin** drop-down list.
11. When adding a TDR, you must make an entry in the **Details** tab. The **Details** tab contains additional information about the TDR.

Select the **Import** button if you wish to import text from an external text file. Select the **Export** button if you wish to export text to an external text file.



12. Select the **Save** button.

The Add System TDR window closes and the new TDR appears on the System Testing window **TDR** tab.



■ Steps for Modifying a TDR

You can modify or augment system existing TDR information. Access to update the TDR values depends on the TDR status. For example, if the status is **Canceled**, you cannot modify the TDR.

1. Select the TDR you wish to modify.
2. Select the **Configure** button.

The Configure System TDR window opens.

The screenshot shows the 'Configure System TDR' window with the 'Configuration' tab selected. The window title is 'Configure System TDR'. At the top, it displays 'Release ID: 97-02', 'Testing Level: SAT', 'Testing Event: TE001', and 'TDR Number: 001'. Below this are six tabs: 'Configuration', 'Details', 'Resolution', 'Routing', 'SCR', and 'X-Ref'. The 'Configuration' tab contains the following fields:

- TDR ID: 001
- Status: Initiated
- Event: TE001 (dropdown)
- Originator: SUPERVISOR Technical Supervisor (dropdown)
- Initiation Date: 08/12/2000
- Returned Date: 00/00/0000
- Retest Date: 00/00/0000
- Converted Date: 00/00/0000 to SCR: (dropdown) [SCR button]
- Cancellation Date: 00/00/0000
- Transferred Date: 00/00/0000
- Priority: Moderate (dropdown)
- Criticality: Moderate (dropdown)
- Suspected Origin: CM/RM (dropdown)
- Actual Origin: Unknown (dropdown)

At the bottom are buttons: Closure, Save, Cancel, Forward..., Print..., and Help.

3. On the **Configuration** tab, enter or modify the desired values.
4. If you wish to modify the TDR details, select the **Details** tab and make the desired changes.
5. If you wish to modify TDR Resolution information, select the **Resolution** tab and make the desired changes.

The screenshot shows the 'Configure System TDR' window with the 'Details' tab selected. The window title is 'Configure System TDR'. At the top, it displays 'Release ID: 97-02', 'Testing Level: SAT', 'Testing Event: TE001', and 'TDR Number: 001'. Below this are six tabs: 'Configuration', 'Details', 'Resolution', 'Routing', 'SCR', and 'X-Ref'. The 'Details' tab contains a large text area with the message: 'This TDR was corrected in 3 hours less time than projected.' Below the text area are buttons: Export and Import. At the bottom are buttons: Closure, Save, Cancel, Forward..., Print..., and Help.

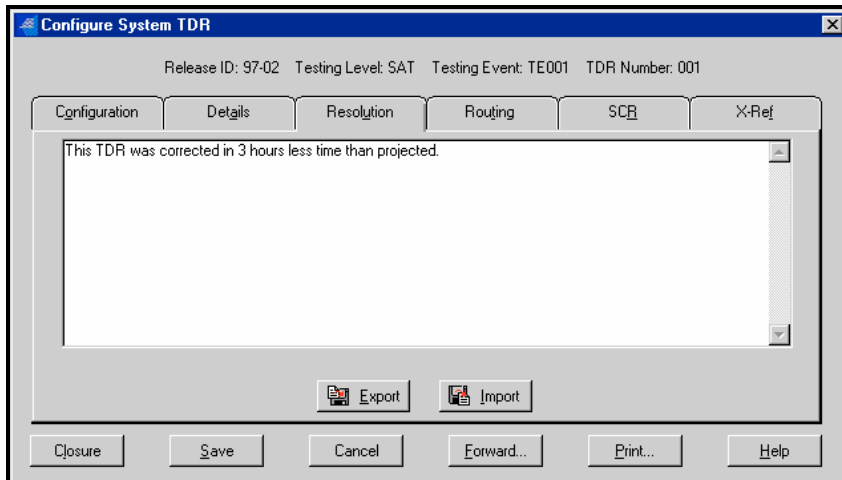
6. Select the **Save** button to save your changes.

The Configure System TDR window will close.

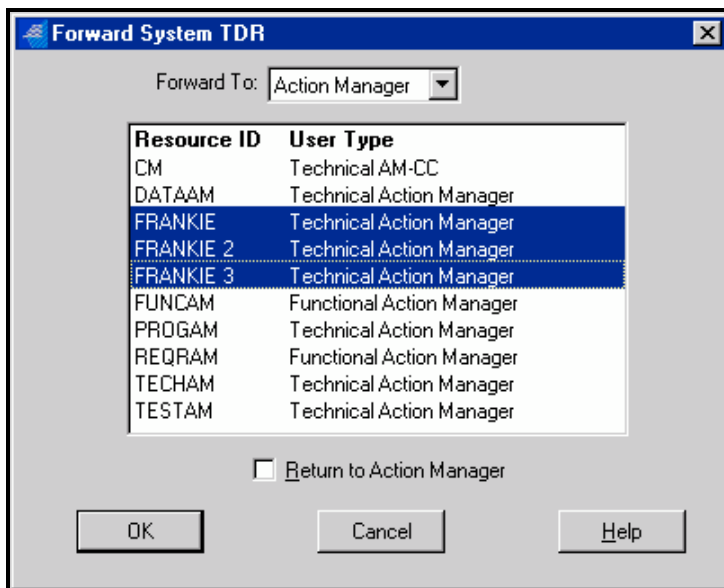
■ Steps for Forwarding a System TDR

The Forward System TDR option allows authorized users to forward TDR's to other users. You cannot forward a system TDR with a status of **Retest**, **Canceled**, **Transferred**, or **Deferred**.

1. Select the **Forward** button on the Configure System TDR window.



The Forward System TDR window opens.



2. From the **Forward To** drop-down list select the user type: **Action Manager** or **Employee**. Select **Action Manager** to access a list of Action Managers and Action Manager-Change Coordinators to whom you can forward the TDR. Selecting **Employee** will access a list of Employees and Release Managers to whom you can forward the TDR.
3. Select the desired resource ID's from the list.
4. If you are returning the TDR to the user who forwarded it to you, check the **Return to Action Manger** box.
5. Select the **OK** button.

A message confirms the TDR forwarding action.

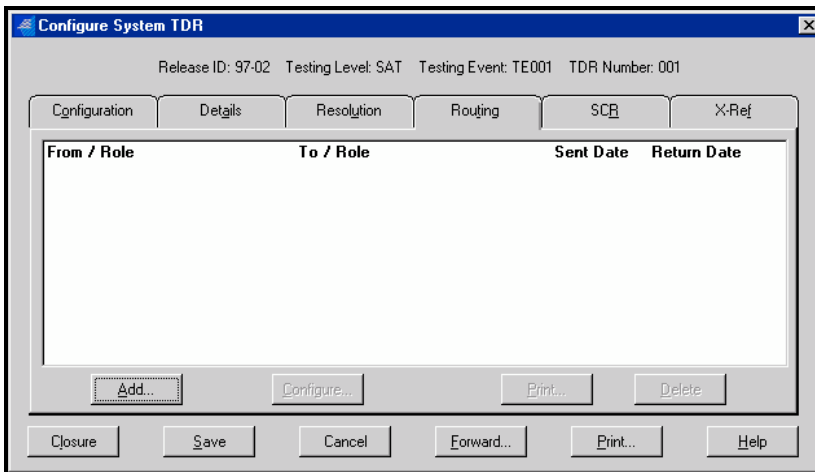


■ Steps for Creating/Modifying TDR Routing

The Add/Configure System TDR Routing option allows Configuration Managers to add, delete, and modify TDR routings. You cannot modify routings if the TDR has a status of **Retested**, **Deferred**, **Canceled**, **Not Fixed**, or **Transferred**. You cannot delete a routing if the system test has ended.

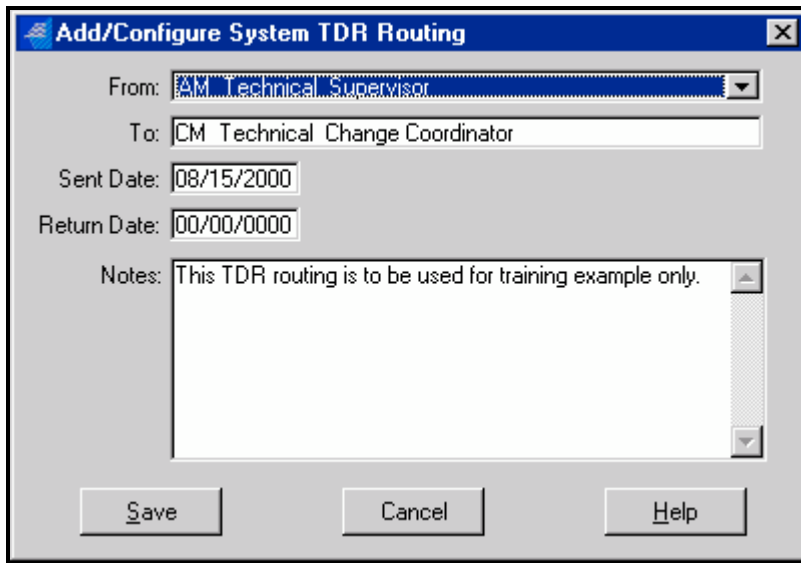
Tip Users normally perform TDR routing by using the Forwarding option. Configuration Managers usually add, modify, or delete routings via the **Routing** tab only to correct routing problems.

1. Select the Configure System TDR window **Routing** tab.



2. Select the **Add** button.

The Add/Configure System TDR Routing window opens.



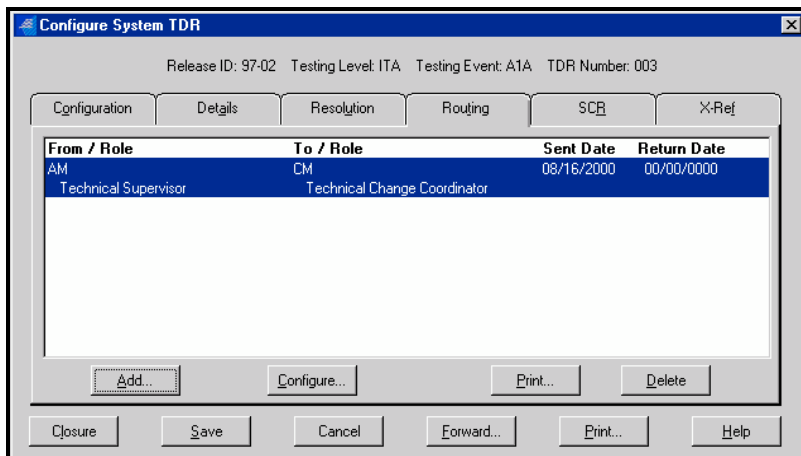
The window titled "Add/Configure System TDR Routing" contains the following fields and controls:

- From:** A drop-down menu with "AM Technical Supervisor" selected.
- To:** A text field containing "CM Technical Change Coordinator".
- Sent Date:** A date field containing "08/15/2000".
- Return Date:** A date field containing "00/00/0000".
- Notes:** A text area containing "This TDR routing is to be used for training example only."
- Buttons:** "Save", "Cancel", and "Help" at the bottom.

3. From the **From** drop-down list, select the user who will receive the TDR when it is returned.
4. From the **To** drop-down list, select the user to whom the TDR will be routed.
5. The **Sent Date** values defaults to the current date. You can modify this required value but it must be later than the initiation date and earlier than the return date.
6. In the **Return Date** field, enter the date the TDR was returned from routing. This date must be either identical to or later than the initiation and sent dates.

The **Notes** field contains TDR information added by the resource who received the TDR.

7. Select the **Save** button. The new routing appears in the **Routing** tab.



The window titled "Configure System TDR" displays routing information in the **Routing** tab. At the top, it shows: Release ID: 97-02, Testing Level: ITA, Testing Event: A1A, TDR Number: 003. The tabs are Configuration, Details, Resolution, Routing, SCR, and X-Ref. The Routing tab contains a table with the following data:

From / Role	To / Role	Sent Date	Return Date
AM Technical Supervisor	CM Technical Change Coordinator	08/16/2000	00/00/0000

Below the table are buttons: "Add...", "Configure...", "Print...", and "Delete". At the bottom of the window are buttons: "Closure", "Save", "Cancel", "Forward...", "Print...", and "Help".

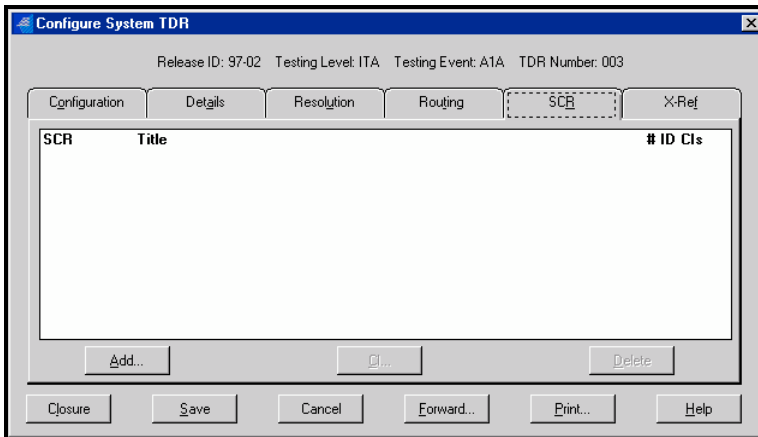
To modify existing routing information, select the desired routing from the Configure System TDR window **Routing** tab list. Select the **Configure** button. The Add/Configure System TDR Routing window opens. After you make the desired changes, select the **Save** button.

■ Steps for Adding SCR's to a TDR, Identifying

Configuration Items, and Generating Configuration Change Orders (CCO's)

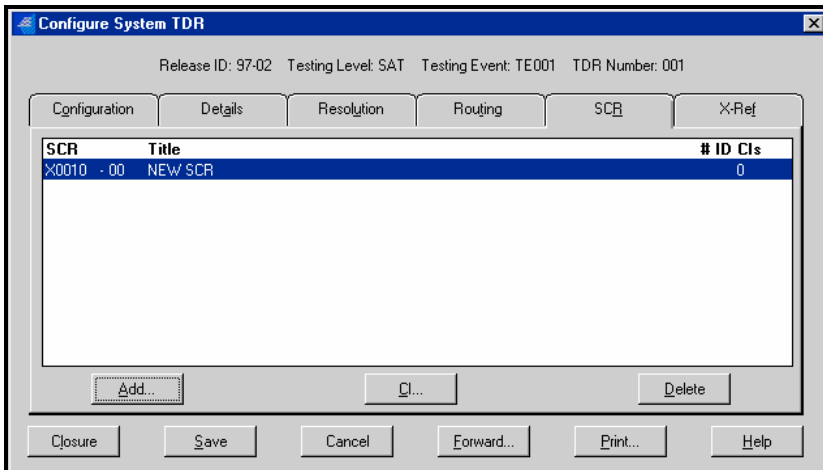
The Configure System TDR window **SCR** tab allows users to view information about SCR's causing the system testing deficiency. Users also can add SCR's to the TDR and identify configuration items (CI's) from which to generate CCO's for resolving identified problems.

1. Select the Configure System TDR window **SCR** tab.



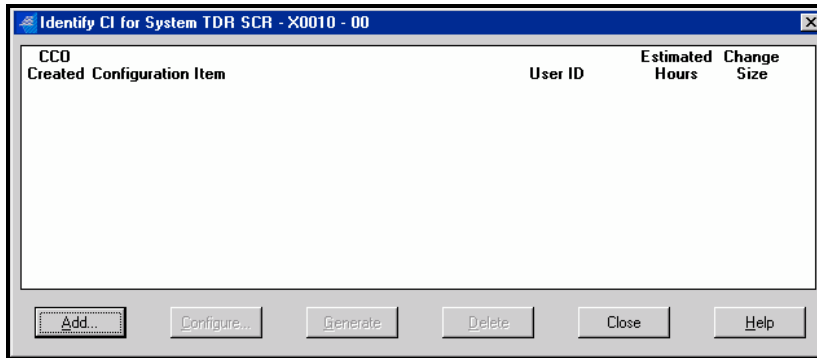
2. Select the **Add** button. The Add SCR to TDR window opens.
3. Select the desired SCR from the **SCR** drop-down list.
4. Select the **Save** button.

The Add SCR to TDR window closes and the selected SCR appears in the **SCR** tab.



5. To identify CI's for the selected SCR, select the **CI** button.

The Identify CI for System TDR SCR window opens.



6. Select the **Add** button.

The Add/Configure CI for System TDR SCR window opens.

7. Select a CI type from the **CI Type** drop-down list.
8. From the **Assigned To** drop-down list, select the user responsible for the CCO.
9. Enter an estimate of the number of hours required to complete the CCO in the **Estimated Hours** field.
10. If the AIS Maintenance window **Size of Change** field contains a value greater than **0**, enter a value in the **Size of Change** field that reflects the scope of the CCO.
11. Select the **Save** button.

After you save the TDR SCR CI information, the Add/Configure CI for System TDR SCR window will indicate if the save action was successful.

CI Type: PC

Name: 0040

Assigned To: DATA01

Estimated Hours: 4

Size of Change: 3

Successfull save of CI: 0040

Save Close Help

After you save the CI for the system TDR SCR, Add/Configure CI for System TDR SCR window will remain open. You can continue to add and additional CI's for the TDR SCR.

12. When you are finished adding CI's, select the **Close** button.

Add/Configure CI for System TDR SCR only identifies those CI's that need to be created. After adding one or more CI's for the system TDR SCR, you can generate CCO's for the CI's.

13. Select the Identify CI for System TDR SCR window **Generate** button.

CCO Created	Configuration Item	User ID	Estimated Hours	Change Size
<input type="checkbox"/>	PC 0040	DATA01	4	3

Add... Configure... Generate Delete Close Help

F i g

The System Testing Generate Results window displays the results of the CCO generation.

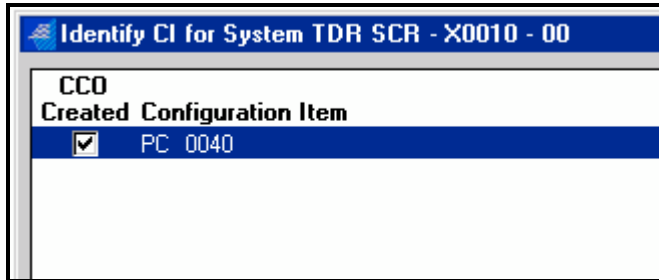
Results

CCO generated for CI: PC 0040 DATA01.

Print Close Help

14. Select the **Close** button.

After you close the System Testing Generate Results window, the Identify CI for System TDR SCR window **CCO Created** checkbox will contain a check for the selected CI.

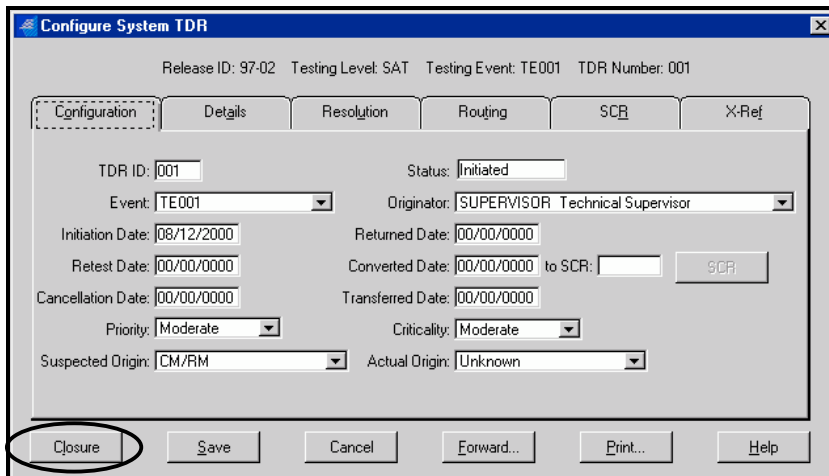


■ Steps for Transferring Test TDR's Between Levels

You can transfer TDR's between levels of the same release.

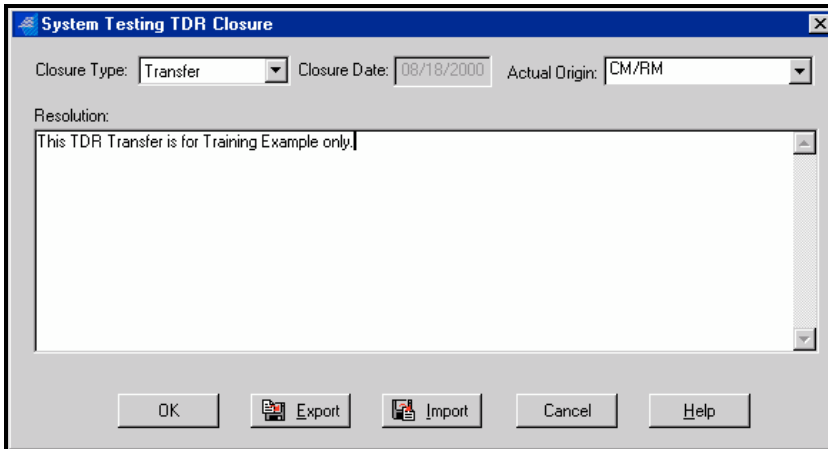
1. Select the desired release on the System Testing window.
2. Select the TDR you wish to transfer.
3. Select the **Configure** button.

The Configure System TDR window opens.



4. Select the **Closure** button.

The System Testing TDR Closure window opens.

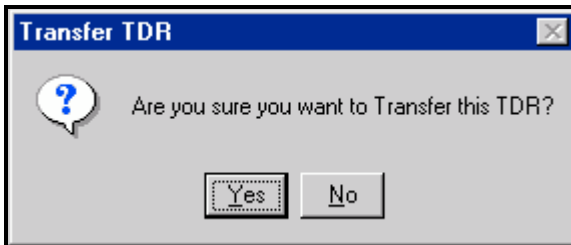


5. From the **Closure Type** drop-down list, select **Transfer**.

Note When transferring a TDR, the **Closure Date** field defaults to the current date and cannot be changed.

6. If you know the origin of the TDR, select the desired value from the **Actual Origin** drop-down list.
7. Enter a value for the **Resolution** text field if desired.
8. Select the **OK** button.

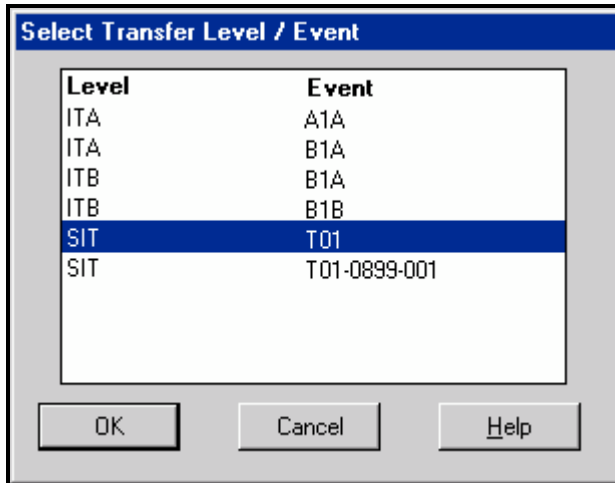
A message asks you to confirm the TDR transfer.



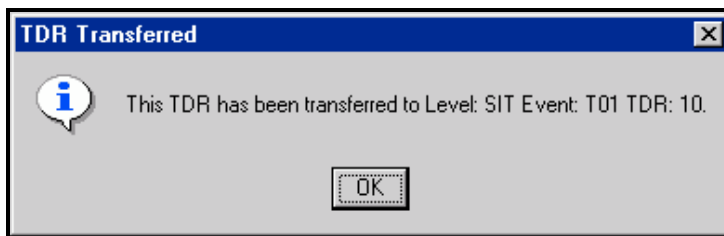
9. Select the **Yes** button.

The Select Transfer Level/Event window opens.

10. Select the **Level/Event** you are transferring the TDR to.
11. Select the **OK** button.



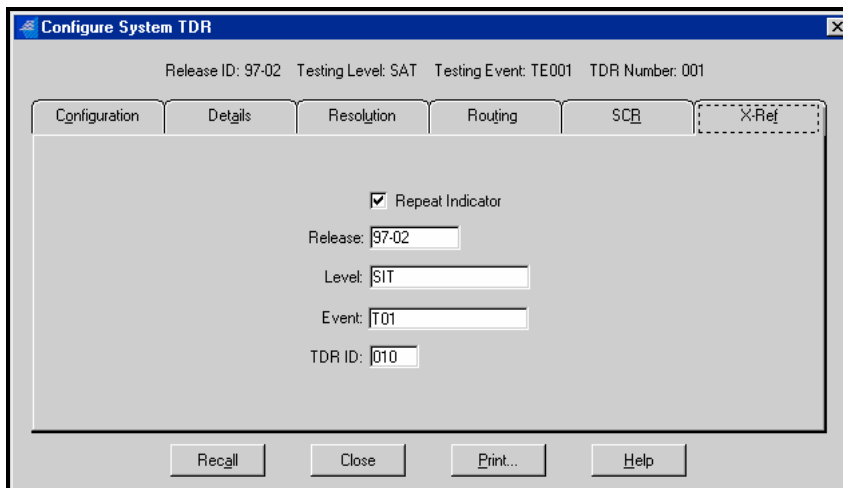
The Select Transfer Level/Event window closes, and a message confirms the TDR transfer.



F
i

12. Select the **OK** button to close the message.

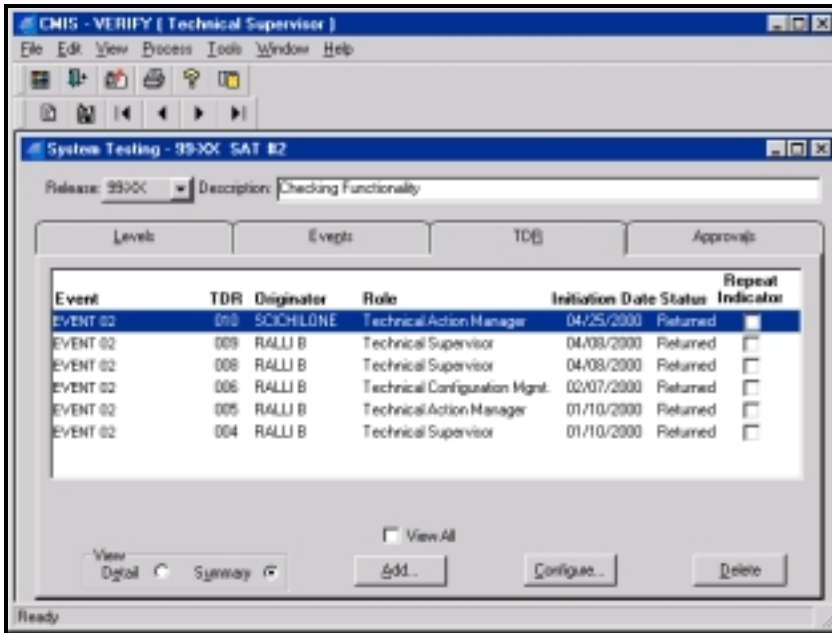
On the Configure System TDR window, the **X-Ref** tab contains a record of the TDR transfer.



■ Steps for Closing a TDR

Closing a TDR allows you to indicate how a testing problem was resolved. As discussed in the previous section, transferring a TDR to another level is one way to close a TDR. You also can close a TDR by retesting, indicating the problem has not been fixed, canceling the TDR, or converting it to an SCR.

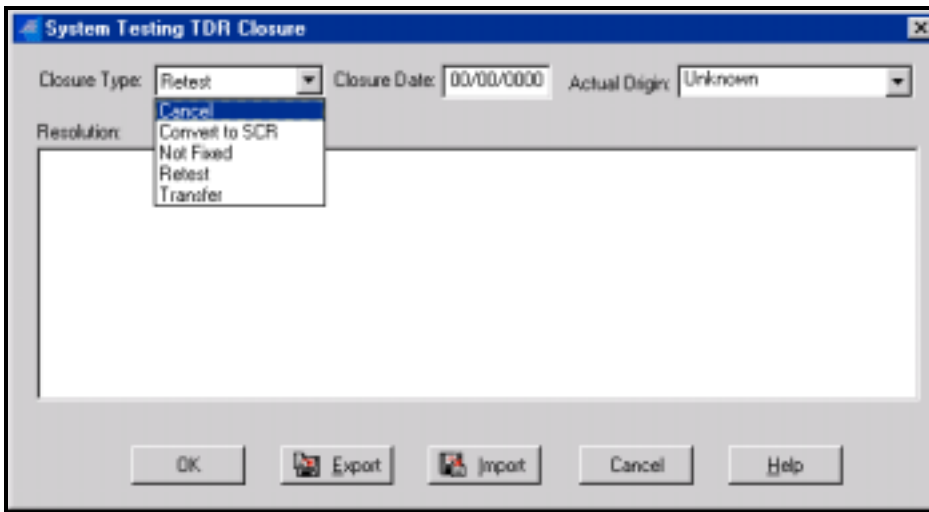
1. Select the desired release on the System Testing window.
2. Select the desired level on the **Levels** tab.
3. Select the desired event on the **Events** tab.
4. Select the TDR you wish to close on the **TDR** tab.



5. Select **TDR Closure** from the **Edit** menu.

The System Testing TDR Closure window will open.

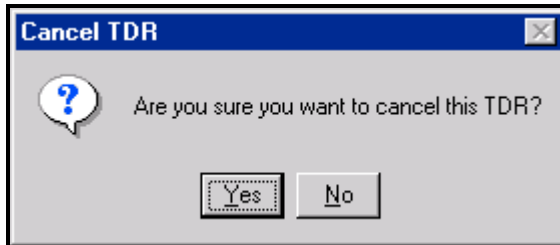
6. Select the desired value from the **Closure Type** drop-down list.



7. Enter the desired value in the **Closure Date** field.

8. Select a value from the **Actual Origin** drop-down list if applicable.
9. Enter explanatory comments in the **Resolution** text field. You can use the **Import** button to import text from an external text file. To export the **Resolution** text to an external text file, select the **Export** button.

A message will ask you to confirm the closure action.



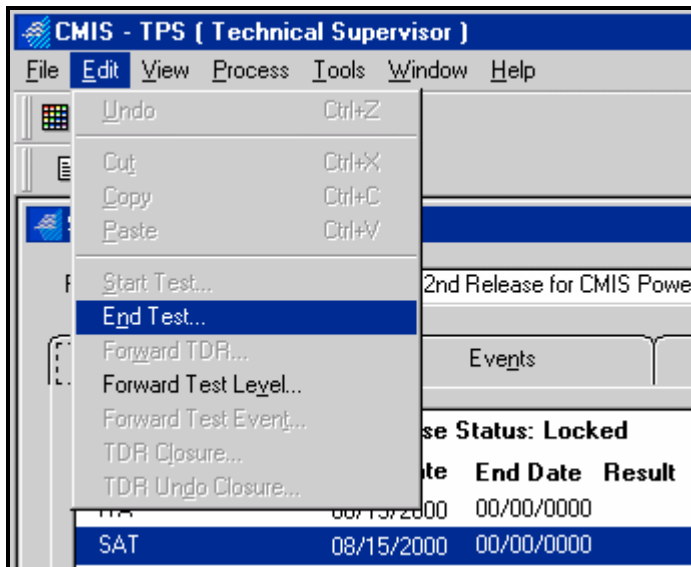
10. Select **Yes** on the message to confirm the TDR closure.
11. Select the **OK** button to save your changes and close the System Testing TDR Closure window

■ Steps for Ending a System Test

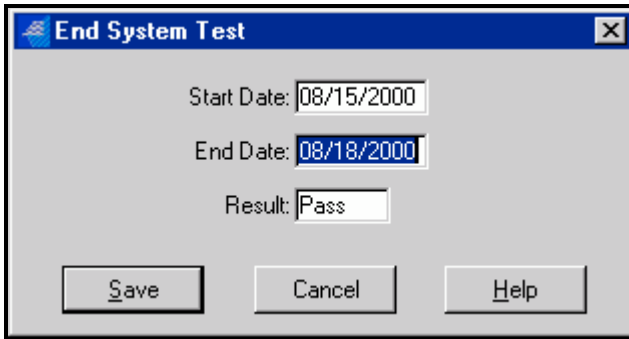
The End System Test option allows authorized users to indicate completion of testing for a release.

NOTE You cannot end a test until each event for the system test has been completed and contains an end date.

1. On the System Testing window, select the system test you wish to end.
2. Select **End Test** from the **Edit** menu.



The End System Test window opens.



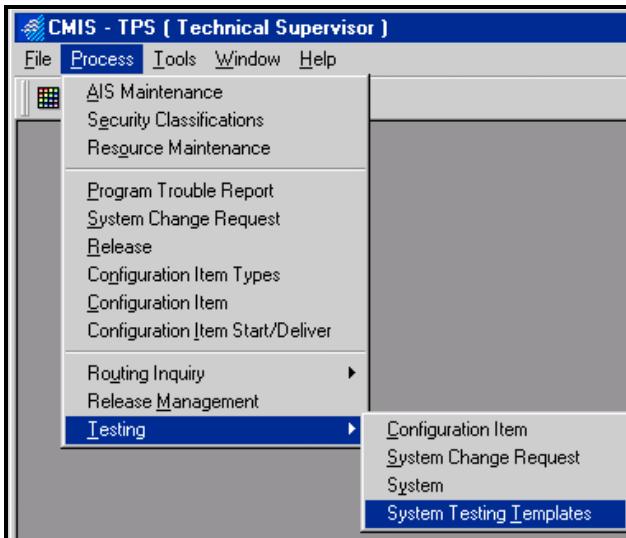
3. The **End Date** value defaults to the current date. You can change this value if you wish.
4. Select the **Save** button.

The End System Test window closes.

■ Steps for Creating a System Testing Event Template

You can create AIS-specific system test level and system test event templates to expedite the process of system testing. After you create testing templates, you can use these templates when creating new test levels and events.

1. From the **Process** menu select **System Testing Templates** from the **Testing** submenu.



The System Testing Template Maintenance window opens.

Event	Assign To / Role	Estimated Hours	Estimated Change Size	Priority/ Sequence	Change#/ Record ID
B1B	FRANKIE Technical Action Manager				
B1C	FRANKIE 3 Technical Action Manager	5	15		
B1D	DATAAM Technical Action Manager	3	15	A	

Filter: Not Filtered

Add... Configure... Filter... Delete

2. Select the **Events** tab.
3. Select the **Add** button.

The Add System Testing Event Template opens.

Event: B1E Result:

Assigned To: DATA01 Technical Employee

Code: TEDWR Organization Type: Technical

Start Date: End Date:

Estimated Hours: 5 Actual Hours:

Estimated Change Size: 3 Actual Change Size:

Priority: Change #:

Sequence: Record ID:

Status:

Save Cancel Work Fields Help

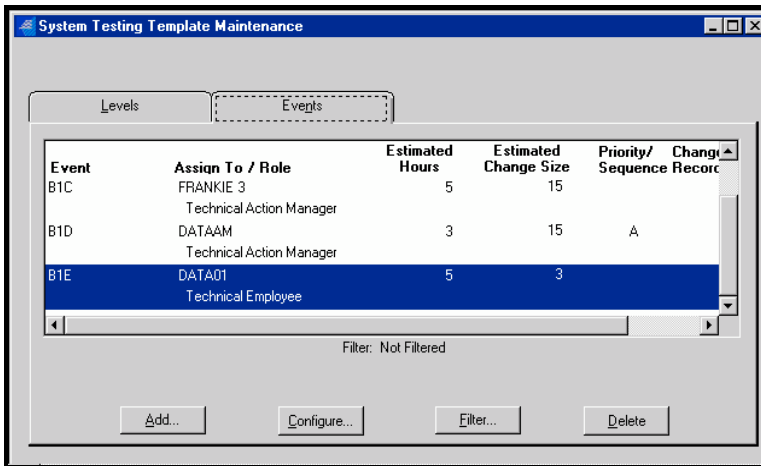
4. In the **Event** field enter an event name of up to 12 characters.
5. From the **Assigned To** drop-down list, select the user to whom the event has been assigned. CMIS will provide the **Code** and **Organization Type** of the user selected.
6. Enter the number of hours estimated to complete the event in the **Estimated Hours** field.
7. The estimated change size is an AIS determined value assigned to the scope of the event. Enter a value in the **Estimated Change Size** field.

The **Priority**, **Change #**, **Sequence**, and **Record ID** fields do not have specific usage rules. CMIS Administrators can define these fields for specific uses within their AIS.

Tip The **Result**, **Start Date**, **End date**, **Actual Hours**, and **Actual Change Size** fields are not available when creating event templates.

8. Select the **Save** button.

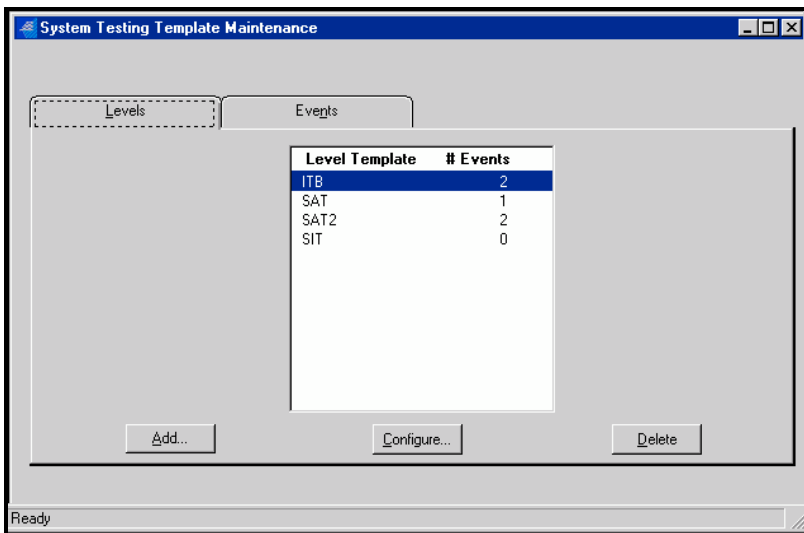
The new event appears on the System Testing Template Maintenance window **Events** tab.



■ Steps for Creating a System Testing Level Template

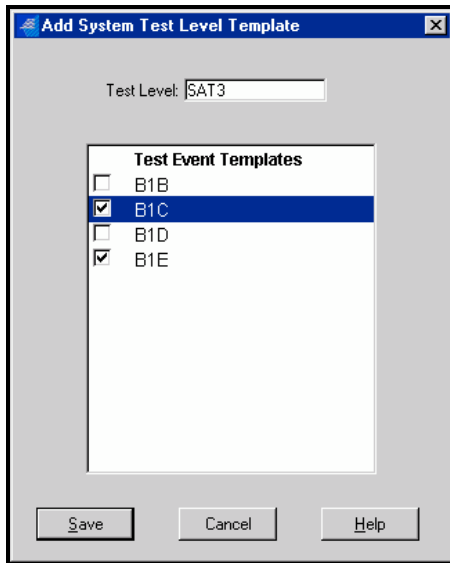
System testing level templates expedite the creation of system tests.

1. Select the System Testing Template Maintenance window **Levels** tab.



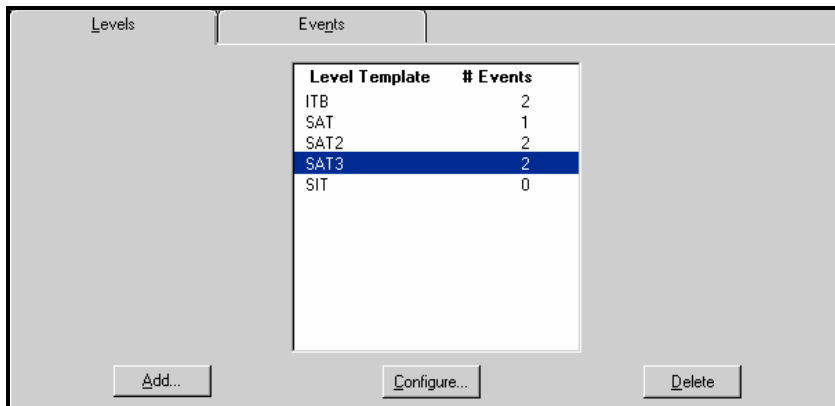
2. Select the **Add** button.

The Add System Test Level Template window opens.



3. Enter a name for the template in the **Test Level** field.
4. Select each test event you wish to add to the template.
5. Select the **Save** button.

The Add System Test Level Template window closes and the new template displays on the System Testing Template Maintenance window **Levels** tab.

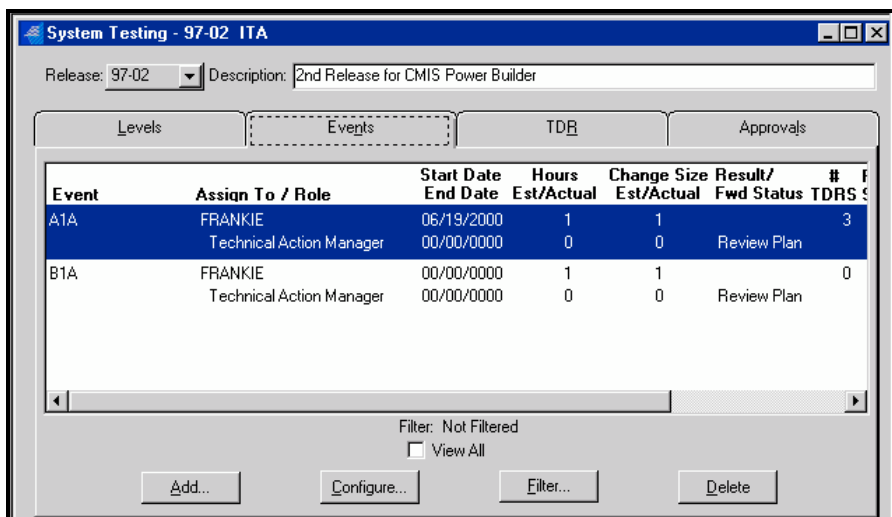


■ Steps for Creating a New System Testing Event Using a Template

After you have created system testing templates, you can use the templates when creating new test events

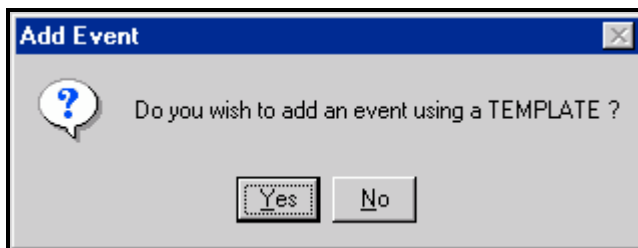
1. On the System Testing window, select the desired release.

Select the **Events** tab.



2. Select the **Add** button.

A message will ask if you wish to use a template for the event.

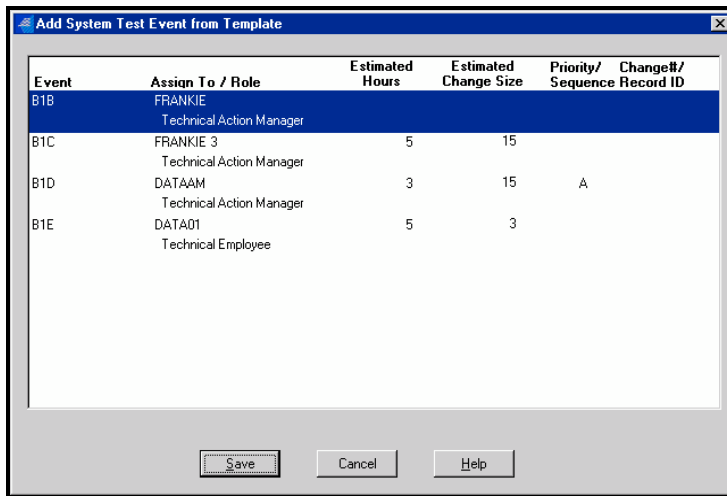


3. Select the **Yes** button.

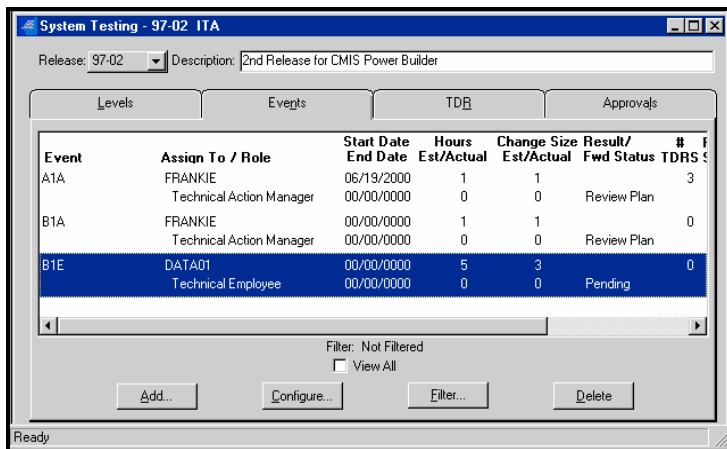
The Add System Test Event from Template window opens.

4. Select the desired event.

5. Select the **Save** button.



The Add System Test Event from Template window closes, and the new event appears on the System Testing window **Events** tab.

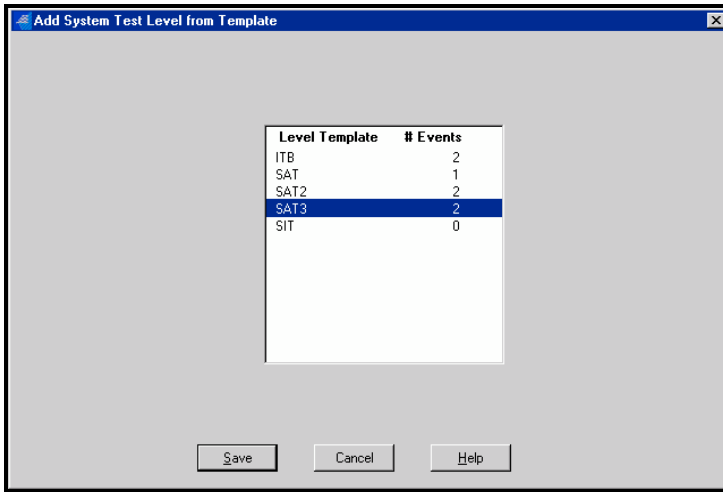


■ Steps for Creating a New System Test Level Using a Template

You can create new system test levels using templates.

1. On the System Testing window, select the desired release from the **Release** drop-down list.
2. Select the **New** toolbar button.
3. Select **Yes** on the message asking if you wish to create a new system test level using a template.

The Add System Test Level from Template window opens.



4. Select the desired template.
5. Select the **Save** button.

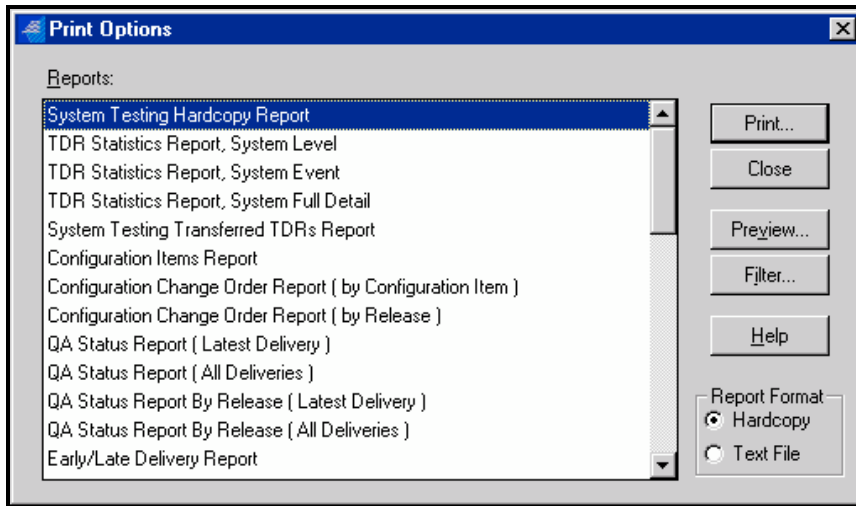
The Add System Test Level from Template window closes, and the new system testing level is created.

■ **Steps for Printing System Test Reports**

CMIS can generate several reports related to system testing. You can view the desired report on your monitor, print a hard copy of the report, filter the report, or save the report as a text file. CMIS provides the following system testing reports:

- System Testing Hardcopy Report
 - TDR Statistics Report, System Level
 - TDR Statistics Report, System Event
 - TDR Statistics Report, System Full Detail
 - System Testing Transferred TDR's Report
1. From the System Testing window select the **Print** toolbar button or select **Print** from the **File** menu.

The Print Options Window opens.



2. Select the desired report.

You can view the report on your monitor by selecting the **Preview** button. For some reports, a filter is available. To access the report Filter window, select the **Filter** button. You can save the report as a text file by selecting the **Report Format Text File** radio button, then selecting the **Print** button.

3. To print the selected report, select the **Print** button.

Appendix A

Glossary

Acting Assignment

An assignment to act on behalf of another user. Acting resources can access CMIS and perform many of the same functions as the resources for whom they are acting.

Action Manager (AM)

A CMIS user type who supervises a group of Employees. An Action Manager is either functional or technical.

Action Manager-Change Coordinator (AM-CC)

A CMIS user type that integrates the responsibilities of the Action Manager and Change Coordinator roles into a single role. An Action Manager-Change Coordinator is either functional or technical.

Alternate Release Manager

A Release Manager assigned specific responsibilities for an automated information system's (AIS) configuration items (CI's). A Release Manager is in the technical area.

Automated Information System (AIS)

An integration of one or more computer programs that execute under an operating system (DOS, Windows, Windows NT) to perform some computing function or process. Often, the integrated programs are referred to as an *application* or *system*.

Certifying the Release

A process in which all involved parties certify their part of a release has been completed and is ready to be placed in production. Usually, the TCC or the Configuration Manager performs this function but release management personnel also can certify releases.

Change Coordinator

A CMIS user type responsible for the electronic routing of system change requests (SCR's). A Change Coordinator is either functional or technical. Usually an automated information system (AIS) has one Functional Change Coordinator and one Technical Change Coordinator.

Child

The subordinate role in a relationship between two system change requests or program trouble reports (PTR's). A child PTR or SCR must be completed before its parent can be completed.

Configuration Change Order (CCO)

A CCO identifies the detailed tasks necessary to implement an SCR. Each CCO is associated with an approved SCR and provides authorization to change a configuration item.

Configuration Control Board (CCB)

An AIS user committee that meets occasionally to determine which SCR's are necessary for the continued success of the AIS. CCB members weigh not only the scope and necessity of each SCR but the cost as well.

Configuration Item (CI)

A configuration component that will be controlled. A CI consists of the two-character configuration item type code plus the unique alphanumeric name of the CI.

Configuration Item (CI) Start/Deliver

The process that allows authorized users to initiate, complete, and deliver CI tasks.

Configuration Item (CI) Testing

Testing only the changed CI without any supporting program.

Configuration Item (CI) Types

A general category of CI's. CI's are entered into CMIS using a CI type identifier and a CI identifier. A CI type ID is usually two characters and descriptive enough to indicate its purpose.

Configuration Management (CM)

Configuration management (CM) is a discipline to apply technical and administrative direction and surveillance of changes to an AIS.

CMIS (Configuration Management Information System)

The DFAS computer system that uses the principles and practices of configuration management to monitor and control changes to an AIS.

Configuration Management Information System (CMIS) Administrator

The resource with the role of technical supervisor. Also known as *Technical Supervisor* or *System Supervisor*, the CMIS Administrator is the only user type who can add and delete AIS's and resources. The CMIS Administrator is in the technical area.

Configuration Manager (CM)

The user type responsible for updating the CMIS tables, moving SCR's out of locked releases, and unlocking releases. This user type is in the technical area.

Customer

Any user of CMIS.

Deliverable

A CI that requires Release Management processing.

Dependency

A relationship between two tasks that prescribes the order in which the tasks must be performed. Primarily used in project management.

DFAS

Defense Finance and Accounting Service.

DSN

Defense Switching Network.

ECL

Executive Control Language.

Exporting a Release

The process of exporting a release to a project management tool.

Employee

A functional, technical, or testing and evaluation (T&E) user type who reports to an Action Manager.

Employing activity

Identifies a resource's duty station.

Event

A testing scenario that validates the functionality of a system change request (SCR) or release.

External E-mail Logon ID

The ID the user employs to connect to an external e-mail system.

External E-Mail Address

The address external to CMIS where copies of CMIS mail will be sent. This address can be formatted for a specific e-mail application or as an Internet address.

FSA

Financial Systems Activity.

FSO

Financial Systems Organization.

Functional Change Coordinator (FCC)

A CMIS user type responsible for the electronic routing of SCR's in the functional area. Usually an AIS has one Functional Change Coordinator and one Technical Change Coordinator.

Functional Employee

A user type in the functional area who reports to a Functional Action Manager.

Functional Analysis

A detailed, non-technical description of the system problem.

Hard Delete

A delete action that permanently removes a CI. It is available only for CI's that do not have open CCO's

Higher Authority

A CMIS user type with limited access to the CMIS application who has the authority to approve or reject SCR's that exceed the SCR cost threshold. This user type is in the technical area.

Impacting

The process of determining what configuration items will change, who will change them, and how long it will take to make the changes in order to implement the SCR.

Importing a Release

The process of importing a release from a project management tool.

Initial Entry

A mock routing CMIS creates for each new SCR, regardless of the originator's role. Initial entry forwarding sets an open routing for the SCR.

Internal Mail System

A mail system within CMIS that allows users to send and receive on-line messages.

JCL

Job Control Language.

Level

A testing scenario that validates the functionality of a configuration item CI, an SCR, or a complete system.

Life Cycle Management (LCM)

The management of changes to an AIS.

Locking a Release

The process of closing a release so that developers can start work on their CCO's. When a release is locked, CMIS changes the status to **Approved Locked** for each attached SCR. When the release is locked, CMIS creates an SCR approval record for the release, moves SCR amendment CCO's to the parent SCR, and builds an audit of the release.

Mail Group

A group of mail addressee's. Mail groups preclude selecting each message recipient individually.

Milestone(s)

User-defined items that identify the order in which tasks must be performed to complete a release. Primarily used in project management.

NDS

Novell Directory Services

Notify Messages

Messages other resources have created and sent, and CMIS-generated messages which may require action.

Organization

Identifies the local division within an activity to which a resource is assigned.

Organization Type

Indicates whether the CMIS item or resource is in the functional or technical area.

Parent

The dominant role in a relationship between two system change requests or program trouble reports (PTR's). A parent PTR or SCR cannot be completed until its children are completed.

Password

A secret word or string of characters associated with a specific user ID to grant the user access to the CMIS application.

Pending

The status of an SCR before an Action Manager making a final determination that it is accurate and valid.

Permanent

The status of an SCR when the AM forwards the SCR to the Change Coordinator, the routing is closed, and control of the SCR is transferred.

POC

Point of contact.

Predecessor

A task that is prerequisite to another task. Primarily used in project management.

Primary Release Manager

The Release Manager with primary responsibility for approving and maintaining releases and configuration items of an AIS.

Program Trouble Report (PTR)

A report that allows users to identify and track discrepancies or problems reported in the selected AIS.

Program Trouble Report (PTR) Relationship

Dependencies between PTR's of different AIS's. When you establish a relationship between two PTR's, one PTR will be the "parent" and the other will be the "child."

Project Management Tool

A software application that builds a project schedule. The project management tool compatible with CMIS is Microsoft ® Project 4.0.

Quality Assurance (QA) Configuration Change Order (CCO)

A CCO that tests a CI. QA CCO's are completed during the CI testing process.

Reassign a Resource

The shift of an AIS work assignment when the resource to whom the work was assigned is being removed from the AIS.

Redeliver a Configuration Item (CI)

Redelivering a CI task rejected via release management processing due to an invalid date/time stamp.

Reject Deliveries

Release Management rejection of a delivery.

Release

An updated version of an AIS that includes authorized modifications.

Release Baseline

An audit of a release that includes the release number and the number of SCR's attached to the release. Only the CMIS Administrator can baseline a release.

Release Destination

A code of up to three characters which identifies the release destination of the CI and indicates the CI is a releasable item.

Release Manager (RM)

A CMIS user type responsible for baselining configuration items (CI's) in libraries, sending CI's to programmers and analysts for authorized changes, and receiving updated CI's from programmers and analysts. This user type is in the technical area.

Release Management Processing

A process that allows the completion and rejection of deliveries.

Release Number

The number assigned to a collection of authorized modifications to an AIS.

Remote User

A CMIS user type located outside the Financial Systems Activity (FSA) and who has limited access to the CMIS application. This user type can be in the technical or functional area.

Requirements Definition

That part of an SCR that describes the program problem or new requirement in detail.

Resource

A user of the CMIS application. Resources consist of various users, each of whom is identified by a user ID and password.

Resource ID

A label that identifies a user of the CMIS application. Also known as a *user ID*.

Resource password

A secret word or string of characters associated with a specific resource ID to grant the user access to the CMIS application.

Requirements Rewrite

A forwarding action that returns an SCR (usually to the user responsible for the original requirements) for the purpose of modifying requirements.

Responsibility Code

The organizational code of the organization responsible for a new CI.

Role

The CMIS user type a resource has been assigned within an AIS.

Routing Inquiry

A process that allows users access to routing and approval information. Routing inquiries can be performed for SCR's, CI TDR's, SCR testing TDR's, or system testing TDR's.

Routing Sequence

The order in which SCR's are routed to authorized users.

Security Classification(s)

A category of system users that restricts access to certain areas of the system. Also known as security class(es). Every CMIS user has an assigned security class. The CMIS Administrator assigns security classifications at the user level.

Serial

A method of SCR forwarding in which the selected resources can approve an SCR in sequential order rather than simultaneously.

Shotgun

A method of SCR forwarding in which selected resources can approve a forwarded SCR simultaneously rather than in sequential order.

Soft Delete

A delete action that removes a CI from the Configuration Item window display but allows CMIS to retain the CI name and related data. Also known as a *logical delete*.

Structure

The defined relationship(s) among resources of the same organization type. Structure is defined for Action Managers or Action Manager-Change Coordinators and Employees, and Action Managers or Action Manager-Change Coordinators and Release Managers. Structure affects user access to various CMIS processes. For example, structure determines who can forward system change requests (SCR's) to whom.

Subaction Manager

A category of user type Action Manager who has restricted access to SCR forwarding. Subaction Managers can return SCR's back to the Action Managers who originated them but cannot forward SCR's outside of the defined Action Manager - Subaction Manager relationship. The CMIS Administrator defines Subaction Managers from available Action Managers within the same AIS.

Successor

A task that is dependent on, and performed after, another task. Primarily used in project management.

System Change Request (SCR)

Identifies the need for a change to an AIS. An approved SCR authorizes changes to an AIS.

System Change Request (SCR) Amendment

A modification to an SCR, normally after work has started on the parent SCR.

System Change Request (SCR) Attachment

An file created outside of CMIS that is attached to an SCR.

System Change Request (SCR) Notes

Information for internal coordination and information sharing but not an authoritative source for expanding, limiting, or amending the associated SCR.

System Change Request (SCR) Ranking

The relative importance of an SCR as determined by applicable users.

System Change Request (SCR) Testing

Testing involving only the part of a system (specified in the SCR) to ensure all requirements of the SCR have been met.

System Supervisor

The resource with the user ID of supervisor. Also known as *CMIS Administrator* or *Technical Supervisor*, the System Supervisor is the only user who can add and delete AIS's and resources. The System Supervisor is in the technical area.

System Testing

Tests the entire system as a whole to ensure the system performs every designed function. Also known as *release testing*.

System Testing Template

System Test constructed of predetermined testing events.

Technical Analysis

A detailed, technical description of the system problem.

Technical Change Coordinator (TCC)

A CMIS user type who is responsible for the electronic routing of SCR's in the technical area. Usually an AIS has one Technical Change Coordinator and one Functional Change Coordinator.

Technical Employee

A user type in the technical area who reports to a Technical Action Manager.

Technical Supervisor

The resource with the user ID supervisor. The System Supervisor is the only user who can add and delete AIS's and resources. This resource, also known as *CMIS Administrator* or *System Supervisor*, is in the technical area.

Test Deficiency Report (TDR)

A report that records a problem revealed during testing. A TDR usually generates one or more rework CCO's.

To Do List

A list containing CMIS-generated messages that require an action. CMIS deletes a To Do List message after you complete the action the message requires.

Transfer of Control

Shifting control of an SCR from functional to technical or technical to functional.

Undeleting

The process of restoring a CI that has been soft-deleted.

Unit Identification Code (UIC)

A code that identifies an employing activity.

Unlocking a Release

Reopening a locked release. When a release is unlocked, CMIS will change the status of each SCR attached to the release to **Accepted Scheduled**, an SCR approval record will be created, and any rework CCO's will be removed. CMIS will also remove any configuration items (CI's) that could only be started on a locked release, any CI testing or delivery information, any program discrepancy reports for a CI, and any audit information for the selected release.

User ID

A code that identifies a user of the CMIS application. Also known as a *resource ID*.

User type(s)

Categories of functional or technical users. The user type and the user's security classification determine the resource's access to the application.

Appendix B

Security Classification Settings (including Security Switches)

Security Classification Security Switches	Meaning
SCR – Add SCR	If checked, allows user to add/create SCR's. If not checked, prohibits user from adding/creating an SCR.
SCR – Add/Modify Notes	If checked, allows user to add/change/delete SCR notes. If not checked, prohibits user from adding/changing/deleting SCR notes.
SCR – Maintain Cost/Benefit Analysis	No longer used.
SCR – Certify SCR	No longer used.
CCO – Add CCO	If checked, allows user to add/create a CCO to an SCR. If not checked, prohibits a user from adding/creating a CCO on an SCR.
CCO – Modify CCO	If checked, allows a user to change an existing CCO on an SCR. If not checked, prohibits a user from changing an existing CCO on an SCR.
CCO – Delete CCO	If checked, allows a user to delete an existing CCO from an SCR. If not checked, prohibits a user from deleting an existing CCO from an SCR.
Configuration Item – Start Task	If checked, allows a user to start a CCO. If not checked, prohibits a user from starting a CCO.
Configuration Item – Delivery	If checked, allows a user to deliver a CCO. If not checked, prohibits a user from delivering a CCO.
Configuration Item – Testing	If checked, allows a user to start a CI testing CCO. If not checked, prohibits a user from starting a CI testing CCO.
Print Reports	If checked, allows a user to print/generate reports. If not checked, prohibits a user from printing/generating reports.
System Tables – Maintain Configuration Items	If checked, allows a user to add/change/delete CI types and CI's from the system tables. If not checked, prohibits a user from adding/changing/deleting CI types and CI's from the system tables.
PTR – Add PTR	If checked, allows a user to add/create a PTR. If not checked, prohibits a user from adding/creating a PTR.
PTR – Modify PTR	If checked, allows a user to modify/change an existing PTR If not checked, prohibits a user from modifying/changing an existing PTR.
PTR – Delete PTR	If checked, allows a user to delete an existing PTR. If not checked, prohibits a user from deleting an existing PTR.
Create External Interface Data Extractions	If checked, allows a user to create dBase 4 file structures populated with data from the Oracle database. If not checked, prohibits a user from creating dBase 4 file structures populated with data from the Oracle Database.

Appendix C

List of Reports and Their Purposes

Reports	Purposes
Program Trouble Report Hardcopy	Print the currently displayed Program Trouble Report.
Configuration Item Test Hardcopy	Print the currently displayed Configuration Item Test.
SCR Testing Hardcopy Report	Print the currently displayed SCR Test.
SCR Hardcopy	Print the currently displayed System Change Request.
TDR Statistics Report, SCR Level	Print the TDR's in statistical format at the SCR and Summary Level of detail.
Configuration Type Hardcopy	Print all the Configuration Types.
User ID/Password Report	Print all the CMIS users in the database and their roles.
AIS Maintenance Report	Print the Automated Information Systems in the CMIS database.
System Testing Hardcopy Report	Print the currently displayed System/Release Testing Level information.
Security Classification Titles Report	Print all the Security Classifications in the database and the associated privileges.
Mail Viewed Notification Hardcopy	Print all the user's "Notify" Mail messages that have been read (viewed).
User ID/Password Unassigned Users Report	Print all the CMIS users in the database who have no roles in any AIS.
Mail Unviewed Notification Hardcopy	Print all the user's "Notify" Mail messages that have not been read (unviewed).
System Testing Hardcopy Report	Print all the data for System Testing Levels, Events, and associated TDR's.
System Testing Hardcopy Report (Sub-Events/Work Fields)	Print the System Testing Sub Events and associated Work Fields 1 & 2, along with the Work Fields 1 & 2 associated with System Testing Events.
TDR Statistics Report, SCR Event	Print the number of TDR's "Initiated", "Returned", "Re-Test", "Cancelled" and the number of "Configuration Item(s)" associated with the SCR Testing TDR's by Release and Testing Event.
Organization Report	Print all users in CMIS who have access to the specified AIS grouped by Action Manager to Employee, Action Manger Relationships along with Employees who have no Action Manger, CCB Members, the Routing Sequence for Serial Routings, Remote Users, Higher Authority Users, Configuration Managers, Release Managers and System Administrators.
TDR Statistics Report, SCR Full Detail	Print the "Testing Event," TDR ID", "Initiated Date", "Returned Date", "Re-Test Date", "Cancelled Date" and

Reports	Purposes
	"Configuration Item(s)" associated with the SCR Testing TDR's by Release.
Mail All Notification Hardcopy	Print all of the user's "Notify" mail messages.
TDR Statistics Report, System Level	Print the number of TDR's by Testing Level that have been "Initiated", "Forwarded", "Returned", "Re-Test", "Cancelled", "Deferred", "Converted" and "Transferred" along with the number of "Configuration Item(s)" associated with the TDR's.
SCR Selection Report	Print the SCR Identifier, Customer Control Number, Title, Category, Sub-Category, WBS Levels 1 & 2, Ranking Sequence Number, Status, and Estimated Staff Hours for all the SCR's in a release.
Mail Viewed To Do Hardcopy	Print all of the user's "Notify" mail messages that have not been read (Viewed).
TDR Statistics Report, System Event	Print the number of TDR's by Testing Level and Testing Event that have been "Initiated", "Returned", "Re-Test", "Cancelled", "Deferred", "Converted" and "Transferred" along with the "Configuration Item(s)" associated with the TDR's.
Release Dependency Report	Print the "Predecessor" to "Successor" Relationships for the CCO's in a Release.
Users by AIS Report	Print the number of "Total Active Users" and "Pending Users" along with the number of users signed on: "1-30 days", "31-60 days", "61-90 days", "91-120 days", "121-150 days", "151-180 days", "> 180 days" by AIS.
TDR Statistics Report, System Full Detail	Print by Testing Level, Testing Event and TDR the Date the TDR was "Initiated", "Returned", "Re-Test", "Cancelled", "Deferred", "Converted" and "Transferred" along with the number of "Configuration Item(s)" associated with the TDR's.
All Releases	Print the Release Identifier, Planned Release Date, Actual Release Date, Status, and Status Date of all the Releases in CMIS for the AIS.
Reports	Purposes
Mail Unviewed To Do Hardcopy	Print all of the user's "To Do" mail messages that have not been read (unviewed).
Open Program Trouble Reports	Print all information associated with open PTR's (PTR's that do not have any date in the "Completion Date" field) in CMIS for the AIS
Open Releases	Print the Release Identifier, Planned Release Date, Actual Release Date, Status and Status Date of all the Open Releases (Releases that do not have a date in the Actual Release Date) in CMIS for the AIS.
Mail All To Do Hardcopy	Print all of the user's "To Do" mail messages.
System Testing Transferred TDR's Report	Print the TDR's that have been transferred from one

Reports	Purposes
	Testing Level to another.
All System Change Requests for a Release	Print all information associated with the SCR's within a release.
Open System Change Requests for a Release	Print all the information associated with the Open SCR's (SCR's that do not have a Status of "Completed Certified") within a Release.
All Program Trouble Reports	Print all the Program Trouble Reports in CMIS for the AIS.
Release Certification Report	Print all the SCR's, Amendments, Configuration Items, statistical data on the status of Configuration Change Orders, any errors which would prohibit the Certification of the Release. All the principle managers responsible for the development and Quality Assurance of the Release then sign this report, so that the Release may be shipped to production.
Configuration Items Report	Print the Configuration Items within CMIS for the AIS.
Configuration Change Order Report (by Configuration Item)	Print the Configuration Change Orders in Configuration Item order/sequence.
Configuration Change Order Report (by Release)	Print the Configuration Change Orders in the Release and then Configuration Item order/sequence.
QA Status Report (Latest Delivery)	Print the Delivery Sequence, Delivery Date, Release Management Date, QA Start Date, QA Accept/Return Indicator, and associated Date of the Latest or Most Current CI QA CCO.
QA Status Report (All Deliveries)	Print the Delivery Sequence, Delivery Date, Release Management Date, QA Start Date, QA Accept/Return Indicator, and associated Date of All the CI QA CCO's.
QA Status Report By Release (Latest Delivery)	Print the Delivery Sequence, Delivery Date, Release Management Date, QA Start Date, QA Accept/Return Indicator, and associated Date of the Latest or Most Current CI QA CCO by Release.
QA Status Report By Release (All Deliveries)	Print the Delivery Sequence, Delivery Date, Release Management Date, QA Start Date, QA Accept/Return Indicator, and associated Date of all the CI QA CCO's by Release.
Early/Late Delivery Report	Print the Configuration Change Orders highlighting those that were completed early and those that are not completed but should have been.
Early/Late Starts Report	Print the Configuration Change Orders highlighting those that were started early and those that are not started but should have been.
Tasks Not Scheduled	Print the Configuration Change Orders that were never scheduled.
Tasks Not Scheduled by Resource, Task	Print the Configuration Change Orders that were never scheduled sorted by Resource (user to perform the work)

Reports	Purposes
	and then Task.
Tasks Not Scheduled by Resource Code, Resource	Print the Configuration Change Orders that were never scheduled, sorted by Resource's Organizational Code and then by Resource (user to perform the work), and then Task.
Tasks Scheduled To Start	Print the Configuration Change Orders scheduled to start within the time period specified by the report requestor.
Tasks Scheduled To Start by Resource Code, Resource	Print the Configuration Change Orders scheduled to start within the time period specified by the report requestor, sorted by Resource's Organizational Code, and then by Resource (user to perform the work), and then Task.
Tasks Scheduled To Start by Resource, Task	Print the Configuration Change Orders that are scheduled to start within the time period specified by the report requestor sorted by Resource (user to perform the work) and then Task.
Tasks Scheduled To End	Print the Configuration Change Orders that are scheduled to end within the time period specified by the report requestor.
Tasks Scheduled To End by Resource Code, Resource	Print the Configuration Change Orders that are scheduled to end within the time period specified by the report requestor sorted by Resource's Organizational Code and then by Resource (user to perform the work) and then Task.
Tasks Scheduled To End by Resource, Task	Print the Configuration Change Orders that are scheduled to end within the time period specified by the report requestor sorted by Resource (user to perform the work) and then Task.
Release Letter Enclosure Report	Print the Change Notes for All the CCO's within the specified Release by SCR, along with the Requirements Definition, Functional & Technical Analyses and limited data of the SCR.
Resource Utilization Report	Print All the CCO's for a User by Release, with "Staff Hour Totals" by User, Release, and Organizational Code.
SCR Approvals Report	Print All the Approvals or Routings for an SCR.
SCR Workload Report	Prints the number of SCR's in each of the seven Categories (Emergency, Regulatory, Policy, Enhancement, Enhance/Migration, Technical, and Maintenance) for the specified range of SCR's.
SCR Listing Report	Prints only the SCR Number, Title, Temporary/Permanent Status, Organizational Control, Sub System, Category, Sub Category, Ranking Sequence, Customer Control Number, Release, Target Release, and WBS Levels 1 & 2 for the requested SCR's.
SCR Listing Report by Rank	Prints only the SCR Number, Title, Temporary/Permanent Status, Organizational Control, Sub System, Category, Sub Category, Ranking Sequence, Customer Control

Reports	Purposes
	Number, Release, Target Release, and WBS Levels 1 & 2 for the requested SCR's sorted by Ranking Sequence.
SCR Master Report	Print all the data for the SCR's specified by the report requestor.
SCR Master Report by Rank	Print all the data for the SCR's specified by the report requestor sorted by Ranking Sequence.
SCR Text Report	Print all the data (excluding Configuration Change Orders) for the SCR's specified by the report requestor.
SCR Text Report by Rank	Print all the data (excluding Configuration Change Orders) for the SCR's specified by the report requestor sorted by Ranking Sequence.
Rejected SCR Approvals Report	Print all the Rejected Approvals or Routings for an SCR.

Appendix D

CMIS Oracle Views

CMISPB_ACTING_V - User Acting Designations

Name	Null	Type	Description of Content
USER	Yes	VARCHAR2(10)	Internal CMIS user ID of user who has granted an acting assignment (Grantor).
ACT_USER	Yes	VARCHAR2(10)	Internal CMIS user ID of user who has been granted an acting assignment (Grantee).
ACT_NAME	Yes	VARCHAR2(30)	Internal CMIS name of user who has been granted an acting assignment (Grantee).
ACT_START	Yes	DATE	Actual start date of acting assignment.
ACT_END	Yes	DATE	Actual end date of acting assignment.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_AIS_CONTROL_NUMBERS_V - Automated Information System System Change Request & Program Trouble Report Number Assignments

Name	Null	Type	Description of Content
AIS_NAME	Yes	VARCHAR2(8)	AIS identifier.
TYPE_NUM	Yes	CHAR(4)	Type of sequential number to be assigned “Pnnnn” = PTR numbers; “SCRE” = Temporary SCR numbers (No longer used within CMIS.) ; “SCRX” = Permanent SCR numbers
NEXT_NUM	Yes	VARCHAR2(5)	Next sequential number to be assigned
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_AIS_RELEASE_V - Release Data

Name	Null	Type	Description of Content
REL_NUM	No	VARCHAR2(5)	Release identifier
PLN_ST_DTE	No	DATE	Planned start date
PLN_REL_DT	No	DATE	Planned release date
ACT_REL_DT	Yes	DATE	Actual release date
LOCK_IND	No	VARCHAR2(1)	Locked indicator “U” = Unlocked, “L” = Locked, “C” = Certified
LOCK_DATE	Yes	DATE	Locked date
REL_DESC	Yes	VARCHAR2(2000)	Release description
ROLL_UP_DT	Yes	DATE	Date release was rolled up (No longer used within CMIS.)
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release was certified.

CMISPB_AIS_V - Automated Information System Information

Name	Null	Type	Description of Content
PROJECT	No	VARCHAR2(8)	AIS identifier
PROJ_TITLE	No	VARCHAR2(125)	AIS title
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_ALL_CCO_V - Configuration Change Orders

Name	Null	Type	Description of Content
SCR_NUM	Yes	VARCHAR2(5)	System change request identifier.
AMEND_NUM	Yes	VARCHAR2(2)	System change request amendment number.
UIC	Yes	CHAR(5)	Unit identification code.
QA_FLAG	Yes	VARCHAR2(2)	Quality assurance flag “ ” = Development CCO; “QA” = Test & Evaluation CCO; “RW” = Development Rework CCO; “RQ” = T&E Rework CCO; “TD” = CCO as the result of a TDR.
CTRL_PREFX	Yes	CHAR(2)	Configuration item type identifier.
CTRL_UNIT	Yes	VARCHAR2(40)	Configuration item identifier.
ASSIGN_TO	Yes	VARCHAR2(10)	Internal CMIS user identifier.
ASSN_CODE	Yes	VARCHAR2(5)	Organizational code of CMIS user.
ACT_START	Yes	DATE	Actual start date of CCO.
ACT_END	Yes	DATE	Actual completion date of CCO.
REL_NUM	Yes	VARCHAR2(5)	Release identifier
UNIQUE_KEY	Yes	VARCHAR2(2)	A unique number within REL_NUM, QA_FLAG, CTRL_PREFX, CTRL_UNIT, & ASSIGN_TO.
DEL_SEQ	Yes	NUMBER	(No longer used within CMIS.)
SYN_OF_CHG	Yes	VARCHAR2(2000)	Text description of changes to be made to CI.
ACTION	Yes	VARCHAR2(1)	Amendment CCO's action code NULL = CCO added on parent SCR "A" = Add "C" = Change "D" = Delete
STAFF_HRS	Yes	NUMBER	Estimated number of hours to make changes to CI.
ACTUAL_HRS	Yes	NUMBER	Actual number of hours expended to make changes to CI.
CHG_SIZE	Yes	NUMBER	Estimated size of change to make changes to CI.
ACT_CHGSIZ	Yes	NUMBER	Actual size of change expended to make changes to CI.
CTRL_FN_TC	Yes	VARCHAR2(1)	Functional/Technical organization code "F" = Functional "T" = Technical
FROM_AMDNO	Yes	VARCHAR2(2)	Amendment number where CCO was created. “00” if CCO was created on SCR not amendment.
CCO_PURPOSE	Yes	VARCHAR2(1)	Indicates the purpose of the CCO (i.e. “Initialize” or Create the CI; “Maintain” or Change the CI; “Remove” or Delete the CI from the AIS). “I” = Initialize “M” = Maintain “R” = Remove
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing CCO) was certified.

CMISPB_ALL_USER_UNAVAIL_V - Resource Unavailability

Name	Null	Type	Description of Content
USER	Yes	VARCHAR2(10)	Internal CMIS user identifier.
UNAVIAL_RE	Yes	VARCHAR2(2)	Reason the user is unavailable "AL" = Annual Leave "SL" = Sick Leave "TD" = Temporary Duty "MD" = Military Duty "OU" = Other Unavailable "OW" = Other Work "TG" = Training
FROM_DATE	Yes	DATE	Starting date of unavailability.
TO_DATE	Yes	DATE	Ending date of unavailability.
NO_OF_HRS	Yes	NUMBER	Number of working hours of unavailability.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS Identifier to which the data belongs.

CMISPB_AM_RELATIONSHIPS_V - Action Manager to Employee and Action Manager to Action Manager Cross Reference

Name	Null	Type	Description of Content
PROJECT	Yes	VARCHAR2(8)	Automated information system identifier.
AM_USER	Yes	VARCHAR2(10)	Internal CMIS user identifier of action manager.
EMP_USER	Yes	VARCHAR2(10)	Internal CMIS user identifier of employee.
SUB_AMUSER	Yes	VARCHAR2(10)	Internal CMIS user identifier of subordinate action manager.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_CI_DELIVERY_V - Configuration Item Delivery

Name	Null	Type	Description of Content
CTRL_PREFX	No	CHAR(2)	Configuration item type identifier.
CTRL_UNIT	No	VARCHAR2(40)	Configuration item identifier.
REL_NUM	No	VARCHAR2(5)	Release identifier.
DEL_SEQ	No	NUMBER(3)	CI delivery sequence number (within release).
PDR_NUM	No	NUMBER(3)	Next assignable TDR ID.
CD_33DLDT	Yes	DATE	Date when CI is delivered (system captured and recorded).
CD_33_DT	Yes	DATE	Date and time when a CI is QA accepted or returned if "QA" CCO is present, if not present date and time when CI is delivered (system captured and recorded).
QA_RSP_EMP	Yes	VARCHAR2(10)	Internal CMIS user identifier of T&E user.
DV_RSP_EMP	Yes	VARCHAR2(10)	Internal CMIS user identifier of development user.
RM_PROC_DT	Yes	DATE	Date when RM processes delivery.
QA_ST_TSK	Yes	DATE	Date and time when "QA" CCO is started, if "QA" CCO is present, if not, date and time when CI was delivered.
DATE_STAMP	Yes	DATE	Date stamp of CI source reported when the CI was delivered.
TIME_STAMP	Yes	VARCHAR2(8)	Time stamp of CI source reported when the CI was delivered.
COMMENTS	Yes	VARCHAR2(2000)	"Delivery comments" entered by development when CI is delivered.

MIG_IND	No	VARCHAR2(1)	Indicates if RM requires migration. "Y" = Migration is required "N" = Migration is not required
DELV_SCRS	Yes	VARCHAR2(2000)	List of SCR's for which the CI was delivered.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing CI delivery) was certified.

CMISPB_CI_DELIV_AND_TEST_V - Configuration Item Delivery and Testing

Name	Null	Type	Description of Content
CTRL_PREFX	No	CHAR(2)	Configuration item type identifier.
CTRL_UNIT	No	VARCHAR2(40)	Configuration item identifier.
REL_NUM	No	VARCHAR2(5)	Release identifier
DEL_SEQ	No	NUMBER(3)	CI delivery sequence number (within release).
TEST_LVL	Yes	VARCHAR2(3)	Test level identifier.
COMMENT1	Yes	VARCHAR2(2000)	Contains the literal "testing for SCR(s)" followed by the list of SCR numbers for which the CI was delivered.
COMMENT2	Yes	CHAR(0)	(No longer used within CMIS.)
LVL_PF	Yes	VARCHAR2(1)	Test level pass/fail indicator "P" = Test level passed "F" = Test level failed.
CD_33_STAT	Yes	VARCHAR2(1)	Indicates the status of the CI delivery " " = Unprocessed "A" = Accepted "C" = Completed "R" = Returned (rejected) "r" = Returned due to invalid date (rejected)
PDR_NUM	No	NUMBER(3)	Next assignable TDR ID.
CD_32DLDT	No	DATE	Date when CI is delivered (system captured and recorded).
LVL_DT	Yes	DATE	Date CI level test is completed.
CD_33_DT	Yes	DATE	Date and time when a CI is QA accepted or returned if "QA" CCO is present, if not, present date and time when the CI is delivered (system captured and recorded).
QA_RSP_EMP	Yes	VARCHAR2(10)	Internal CMIS user identifier of T&E user.
DV_RSP_EMP	Yes	VARCHAR2(10)	Internal CMIS user identifier of development user.
RM_PROC_DT	Yes	DATE	Date when RM processes delivery.
LVL_DT_ST	Yes	DATE	Date CI level test is started.
QA_ST_TSK	Yes	DATE	Date and time when "QA" CCO is started, if "QA" CCO is present. If not, date and time when CI was delivered.
DATE_STAMP	Yes	DATE	Date stamp of CI source reported when the CI was delivered.
TIME_STAMP	Yes	VARCHAR2(8)	Time stamp of CI source reported when the CI was delivered.
COMMENTS	Yes	VARCHAR2(2000)	"Delivery comments" entered by development when CI is delivered.
MIG_IND	No	VARCHAR2(1)	Indicates if RM requires migration. "Y" = Migration is required "N" = Migration is not required
DELV_SCRS	Yes	VARCHAR2(2000)	List of SCR's for which the CI was delivered.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing CI delivery and test) was certified.

CMISPB_CI_DEPENDENCY_V - Configuration Item Dependencies

Name	Null	Type	Description of Content
REL_NUM	Yes	VARCHAR2(5)	Release identifier
PQA_FLAG	Yes	VARCHAR2(2)	Predecessor's quality assurance flag " " = Development CCO; "QA" = Test & Evaluation CCO; "RW" = Development Rework CCO; "RQ" = T&E Rework CCO; "TD" = CCO as the result of a TDR
PCTRL_PREF	Yes	VARCHAR2(2)	Predecessor's configuration item type identifier.
PCTRL_UNIT	Yes	VARCHAR2(40)	Predecessor's configuration item identifier.
PASSIGN_TO	Yes	VARCHAR2(10)	Predecessor's internal CMIS user identifier.
PTL_WBS	Yes	VARCHAR2(15)	Predecessor's work breakdown schedule.
SQA_FLAG	Yes	VARCHAR2(2)	Successor's quality assurance flag " " = Development CCO; "QA" = Test & Evaluation CCO; "RW" = Development Rework CCO; "RQ" = T&E Rework CCO; "TD" = CCO as the result of a TDR
SCTRL_PREF	Yes	VARCHAR2(2)	Successor's configuration item type identifier.
SCTRL_UNIT	Yes	VARCHAR2(40)	Successor's configuration item identifier.
SASSIGN_TO	Yes	VARCHAR2(10)	Successor's internal CMIS user identifier.
STL_WBS	Yes	VARCHAR2(15)	Successor's work breakdown schedule.
PART_FACTR	Yes	NUMBER	Partial factor, expressed in a percentage.
PMILESTONE	Yes	CHAR(1)	Predecessor's milestone indicator "Y" = Predecessor is a milestone "N" = Predecessor is not a milestone
SMILESTONE	Yes	CHAR(1)	Successor's milestone indicator "Y" = Successor is a milestone "N" = Successor is not a milestone
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing CI dependency) was certified.

CMISPB_CI_FUNCTION_POINT_DAT_V - Configuration Item Function Point Data

Name	Null	Type	Description of Content
CTRL_PREFIX	No	CHAR(2)	Configuration item type identifier.
CTRL_UNIT	No	VARCHAR2(40)	Configuration item identifier.
FP_ID	No	VARCHAR2(75)	Function point identifier
FP_ELE	Yes	VARCHAR2(3)	Function point element "EI" = External Input "EO" = External Output "EQ" = External Inquiry "EIF" = External Interface File "ILF" = Internal Logical File
FP_FTR	Yes	VARCHAR2(5)	Function point file types referenced.
FP_RET	Yes	VARCHAR2(5)	Function point record element types.
FP_DET	Yes	VARCHAR2(5)	Function point data element types.
FP_RATWGHT	Yes	VARCHAR2(1)	Function point rating weight "L" = Low

Name	Null	Type	Description of Content
			"A" = Average "H" = High "?" = Unknown
GSC	Yes	VARCHAR2(9)	General system characteristics
SCRN_IND	Yes	VARCHAR2(1)	Screen indicator (i.e. is the function point a screen). "Y" = Yes the function point is a screen "N" = No the function point is not a screen
CONV_IND	Yes	VARCHAR2(1)	Conversion indicator (i.e. does the function point perform a conversion function) "Y" = Yes the function point performs a conversion function. "N" = No the function point does not perform a conversion function.
FP_NOTE	Yes	VARCHAR2(100)	Function point note.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_CI_ROLL_UP_V - Configuration Item Roll-Up

Name	Null	Type	Description of Content
REL_NUM	No	VARCHAR2(5)	Release identifier
QA_FLAG	Yes	VARCHAR2(2)	Quality assurance flag " " = Development CCO; "QA" = Test & Evaluation CCO; "RW" = Development Rework CCO; "RQ" = T&E Rework CCO; "TD" = CCO as the result of a TDR
CTRL_PREFX	Yes	VARCHAR2(2)	Configuration item type identifier.
CTRL_UNIT	Yes	VARCHAR2(40)	Configuration item identifier.
ASSIGN_TO	Yes	VARCHAR2(10)	Internal CMIS user identifier.
TL_WBS	Yes	VARCHAR2(15)	Work breakdown schedule.
ASSN_CODE	Yes	VARCHAR2(5)	Organizational code of CMIS user.
SCH_START	Yes	DATE	Scheduled start date.
SCH_END	Yes	DATE	Scheduled end date.
REV_START	Yes	DATE	Revised scheduled start date.
REV_END	Yes	DATE	Revised scheduled end date.
BALANCE_SW	Yes	VARCHAR2(1)	(No longer used within CMIS.)
USRSUP_RVD	No	VARCHAR2(1)	Indicates if a user has updated a revised date via the "Update Schedule" "Y" = a user has updated the revised date "N" = a user has not updated the revised date
CRITL_PATH	Yes	VARCHAR2(1)	Critical path indicator "Y" = this CCO is on the critical path "N" = this CCO is not on the critical path
SCR_LIST	Yes	VARCHAR2(8)	SCR number and SCR amendment concatenated.
STAFF_HRS	Yes	NUMBER	Sum of the staff hours of the rolled up CCO's.
CTRL_FN_TC	Yes	VARCHAR2(1)	Functional/Technical organization code "F" = Functional "T" = Technical
TEMP_TAG	No	VARCHAR2(1)	Temporary item code "P" = Permanent, "T" = Temporary, "E" = Error <Error message contained in ERR_NOS >

Name	Null	Type	Description of Content
ERR_NOS	Yes	LONG	Contains text when the imported schedule is validated against the CMIS tables and errors exist.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing CI roll-up) was certified.

CMISPB_CI_TDR_V - Configuration Item Testing Test Deficiency Reports

Name	Null	Type	Description of Content
CTRL_PREFX	Yes	CHAR(2)	Configuration item type identifier.
CTRL_UNIT	Yes	VARCHAR2(40)	Configuration item identifier.
REL_NUM	Yes	VARCHAR2(5)	Release identifier
DEL_SEQ	Yes	NUMBER	CI delivery sequence number (within release).
PDR_ID	Yes	NUMBER	TDR identifier.
SCR_NUM	Yes	VARCHAR2(5)	System change request identifier.
AMEND_NUM	Yes	VARCHAR2(2)	System change request amendment number.
DESCRIPTON	Yes	VARCHAR2(2000)	Text describing problem.
CRITICALTY	Yes	VARCHAR2(1)	Criticality of the TDR “1” = Emergency “2” = Critical “3” = Non-Critical
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.
DEFICIENCY	Yes	VARCHAR2(1)	TDR deficiency code “1” = Functional “2” = Technical “3” = Test Configuration “4” = Documentation
RESOL_TYPE	Yes	VARCHAR2(1)	Resolution code for the TDR “ ” = Initiated “1” = Fixed “2” = Canceled
RESOLVEDBY	Yes	VARCHAR2(10)	Internal CMIS user identifier of user who resolved the TDR.
RESOLUTION	Yes	VARCHAR2(2000)	Text describing resolution.
DATE_CREAT	Yes	DATE	Date TDR was created.
DATE_UPDAT	Yes	DATE	Date TDR was resolved.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing CI TDR) was certified.

CMISPB_CI_TEST_V - Configuration Item Testing

Name	Null	Type	Description of Content
CTRL_PREFX	No	CHAR(2)	Configuration item type identifier.
CTRL_UNIT	No	VARCHAR2(40)	Configuration item identifier.
REL_NUM	No	VARCHAR2(5)	Release identifier
DEL_SEQ	No	NUMBER(3)	CI delivery sequence number (within release).
TEST_LVL	No	VARCHAR2(3)	Test level identifier.
COMMENT1	Yes	VARCHAR2(2000)	Contains the literal “Testing for SCR(s)” followed by the list of SCR numbers for which the CI was delivered.
COMMENT2	Yes	CHAR(0)	(No longer used within CMIS.)
DETAIL	Yes	VARCHAR2(2000)	Text details of CI test to be conducted.
LVL_PF	Yes	VARCHAR2(1)	Test level pass/fail indicator.

Name	Null	Type	Description of Content
			"P" = Test level passed "F" = Test level failed.
CD_33_STAT	Yes	VARCHAR2(1)	Indicates the status of the CI delivery " " = Unprocessed "A" = Accepted "C" = Completed "R" = Returned (rejected) "r" = Returned due to invalid date (rejected)
LVL_DT	Yes	DATE	Date CI level test is completed.
LVL_DT_ST	Yes	DATE	Date CI level test is started.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing CI test) was certified.

CMISPB_CI_TYPE_V - Configuration Item Types

Name	Null	Type	Description of Content
CTRL_PREFX	No	CHAR(2)	Configuration item type identifier.
TYPE_DESC	No	VARCHAR2(58)	Configuration item type description.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_CI_TYPE_VX - Working View of Configuration Item Types used to gather information for use in other views

Name	Null	Type	Description of Content
CI_TYPE_KEY_SEQ	No	NUMBER(10)	Oracle primary key of configuration item type.
CTRL_PREFX	No	CHAR(2)	Configuration item type identifier.
TYPE_DESC	No	VARCHAR2(58)	Configuration item type description.
DELETE_IND	No	VARCHAR2(1)	Delete indicator "N" = Record is not deleted "Y" = Record is deleted
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_CI_V - Configuration Items

Name	Null	Type	Description of Content
CTRL_PREFX	No	CHAR(2)	Configuration item type identifier.
CTRL_UNIT	No	VARCHAR2(40)	Configuration item identifier.
CTRL_NAME	Yes	VARCHAR2(30)	Configuration item description/name.
RESP_CODE	Yes	CHAR(5)	Organizational unit/code responsible for the maintenance of the CI.
REL_DEST	Yes	CHAR(3)	Release destination of the CI.
LOCATION	Yes	CHAR(4)	Location of CI.
DOC_ID	Yes	CHAR(4)	Document identifier.

Name	Null	Type	Description of Content
DELVRABLES	No	VARCHAR2(1)	CI deliverable indicator "Y" = Something will delivered to RM upon CI delivery "N" = Nothing will be delivered to RM upon CI delivery
UNLOCK_TSK	No	VARCHAR2(1)	CI unlock task indicator (i.e. Can CCO containing CI be started and delivered/completed on an unlocked SCR) "N" = Can not start/deliver CCO on unlocked SCR "Y" = Can start/deliver CCO on unlocked SCR
UNIQ_RLMGR	Yes	VARCHAR2(10)	Internal CMIS user identifier of unique release manager.
UNIQ_RELMG	Yes	VARCHAR2(1)	Is there a unique release manager for the processing of starts and deliveries of this CI indicator. "N" = No there is not a unique release manager, use the primary release manager for the AIS. "Y" = Yes there is a unique release manager, use the release manager specified in UNIQ_RLMGR.
AUTO_GENQA	No	VARCHAR2(1)	Automatically generate "QA" CCO indicator. "Y" = Automatically generate "QA" CCO "N" = Do not Automatically Generate "QA" CCO
QA_TECH	Yes	VARCHAR2(10)	Internal CMIS user identifier of T&E user to be assigned to the automatically generated "QA" CCO.
QA_SET_HRS	Yes	NUMBER(5)	Hours to be used for automatically generated T&E CCO.
QA_PERCENT	Yes	NUMBER(3)	Percentage of development hours used for automatically generated T&E CCO
RLMGR_TYPE	Yes	VARCHAR2(1)	Release manager's 1 byte type code ("0") = Release Manager
TECH_TYPE	Yes	VARCHAR2(1)	T&E User's 1 byte type code "1" = Technical Employee, "2" = Technical Action Manager
FIRST_RELEASE_ID	Yes	VARCHAR2(5)	Release identifier of release when the CI was first a part of the AIS
FIRST_RELEASE_DATE_RECORDED	Yes	DATE	Date of the first release when the CI was first a part of the AIS
FINAL_RELEASE_ID	Yes	VARCHAR2(5)	Release identifier of release when the CI was last a part of the AIS
FINAL_RELEASE_DATE_RECORDED	Yes	DATE	Date of the final release when the CI was last a part of the AIS
CI_ADDED_DATE	Yes	DATE	Date when the CI was added to the AIS system tables.
CI_LAST_CHANGED_DATE	Yes	DATE	Date when the CI was last changed.
CI_DELETED_DATE	Yes	DATE	Date when the CI was removed from the AIS system tables.

Name	Null	Type	Description of Content
GEN_START_TASK_MSG	No	VARCHAR2(1)	Indicator to specify whether a message is sent to release management when a CCO is started. “Y” = Generate a message for CCO start. “N” = Do not generate a message for CCO start.
GEN_DELIV_TASK_MSG	No	VARCHAR2(1)	Indicator to specify whether a message is sent to release management when a CCO is delivered. “Y” = Generate a message for CCO delivery. “N” = Do not generate a message for CCO delivery.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_CI_VX - Working View of Configuration Items used to gather information for use in other views

Name	Null	Type	Description of Content
CFG_ITEM_KEY_SEQ	No	NUMBER(10)	Oracle primary key of CI row.
CTRL_UNIT_ID	No	VARCHAR2(40)	Configuration item identifier.
CI_TYPE_PREFIX_CD	No	CHAR(2)	Configuration item type identifier.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_CMIS_USER_V - Internal CMIS User IDs

Name	Null	Type	Description of Content
USER	Yes	VARCHAR2(10)	Internal CMIS user identifier.
NAME	Yes	VARCHAR2(30)	Internal CMIS user's full name.
CODE	Yes	VARCHAR2(5)	CMIS user's employing activity organizational code.
EMPNG_UIC	Yes	VARCHAR2(5)	Unit identification code of employing activity of CMIS user.
EMPNG_ACTV	Yes	VARCHAR2(19)	CMIS user's employing activity name.
LAST_LOGON_DT	Yes	DATE	Date when user last logged on to CMIS.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_CMIS_USER_VX - Working View of Internal CMIS User IDs used to gather information for use in other views

Name	Null	Type	Description of Content
USER	Yes	VARCHAR2(10)	Internal CMIS user identifier.
NAME	Yes	VARCHAR2(30)	Internal CMIS user's full name.
CODE	Yes	VARCHAR2(5)	CMIS user's employing activity organizational code.
EMPNG_UIC	Yes	VARCHAR2(5)	Unit identification code of employing activity of CMIS user.
EMPNG_ACTV	Yes	VARCHAR2(19)	CMIS user's employing activity name.
LAST_LOGON_DT	Yes	DATE	Date when user last logged on to CMIS.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_FUNC_ACTING_V - User Acting Designations (Functional Only)

Name	Null	Type	Description of Content
USER	No	VARCHAR2(10)	Internal CMIS user ID of user who has granted an acting assignment (Grantor).
ACT_USER	No	VARCHAR2(10)	Internal CMIS user ID of user who has been granted an acting assignment (Grantee).
ACT_NAME	No	VARCHAR2(30)	Internal CMIS name of user who has been granted an acting assignment (Grantee).
ACT_START	No	DATE	Actual start date of acting assignment.
ACT_END	No	DATE	Actual end date of acting assignment.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_FUNC_AM_RELATION_V - Action Manager to Employee and Action Manager to Action Manager Cross Reference (Functional Only)

Name	Null	Type	Description of Content
PROJECT	Yes	VARCHAR2(8)	Automated information system identifier.
AM_USER	Yes	VARCHAR2(10)	Internal CMIS user identifier of action manager.
EMP_USER	Yes	VARCHAR2(10)	Internal CMIS user identifier of employee.
SUB_AMUSER	Yes	VARCHAR2(10)	Internal CMIS user identifier of subordinate action manager.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_FUNC_CCO_V - Configuration Change Orders (Functional Only)

Name	Null	Type	Description of Content
SCR_NUM	No	VARCHAR2(5)	System change request identifier.
AMEND_NUM	No	VARCHAR2(2)	System change request amendment Number.
UIC	Yes	CHAR(5)	Unit identification code.
QA_FLAG	Yes	VARCHAR2(2)	Quality assurance flag “ ” = Development CCO; “QA” = Test & Evaluation CCO; “RW” = Development Rework CCO; “RQ” = T&E Rework CCO; “TD” = CCO as the result of a TDR
CTRL_PREFX	No	CHAR(2)	Configuration item type identifier.
CTRL_UNIT	No	VARCHAR2(40)	Configuration item identifier.
ASSIGN_TO	Yes	VARCHAR2(10)	Internal CMIS user identifier.
ASSN_CODE	Yes	VARCHAR2(5)	Organizational code of CMIS user.
ACT_START	Yes	DATE	Actual start date of CCO.
ACT_END	Yes	DATE	Actual completion date of CCO.
REL_NUM	No	VARCHAR2(5)	Release Identifier
UNIQUE_KEY	No	VARCHAR2(2)	A unique number within REL_NUM, QA_FLAG, CTRL_PREFX, CTRL_UNIT, & ASSIGN_TO.
DEL_SEQ	Yes	NUMBER(3)	(No longer used within CMIS.)
SYN_OF_CHG	Yes	VARCHAR2(2000)	Text description of changes to be made to CI.
ACTION	Yes	VARCHAR2(1)	Amendment CCO's action code NULL = CCO added on parent SCR "A" = Add "C" = Change "D" = Delete
STAFF_HRS	No	NUMBER(5)	Estimated number of hours to make changes to CI.

Name	Null	Type	Description of Content
ACTUAL_HRS	Yes	NUMBER(5)	Actual number of hours expended to make changes to CI.
CHG_SIZE	Yes	NUMBER(2)	Estimated size of change to make changes to CI.
ACT_CHGSIZ	Yes	NUMBER(2)	Actual size of change expended to make changes to CI.
CTRL_FN_TC	No	VARCHAR2(1)	Functional/Technical organization code "F" = Functional "T" = Technical
FROM_AMDNO	Yes	VARCHAR2(2)	Amendment number where CCO was created. "00" if CCO was created on SCR not amendment.
CCO_PURPOSE	Yes	VARCHAR2(1)	Indicates the purpose of the CCO (i.e. "Initialize" or Create the CI; "Maintain" or Change the CI; "Remove" or Delete the CI from the AIS.) "I" = Initialize "M" = Maintain "R" = Remove
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing CCO) was certified.

CMISPB_FUNC_CMIS_USER_V - Internal CMIS User IDs Data (Functional Only)

Name	Null	Type	Description of Content
USER	No	VARCHAR2(10)	Internal CMIS user identifier.
NAME	No	VARCHAR2(30)	Internal CMIS user's full name.
CODE	No	VARCHAR2(5)	CMIS user's employing activity organizational code.
EMPNG_UIC	No	VARCHAR2(5)	Unit identification code of employing activity of CMIS user.
EMPNG_ACTV	No	VARCHAR2(19)	CMIS user's employing activity name.
LAST_LOGON_DT	Yes	DATE	Date when user last logged on to CMIS.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_FUNC_MAIL_GROUP_V - Group IDs for Message Addressing (Functional Only)

Name	Null	Type	Description of Content
USER_ID	No	VARCHAR2(10)	Internal CMIS user identifier of group owner.
GROUP_ID	No	VARCHAR2(10)	Internal CMIS mail group identifier.
GUSER_ID	No	VARCHAR2(10)	Internal CMIS user identifier of group member.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_FUNC_USER_ACCESS_V - Internal CMIS User ID to Automated Information System Access Information (Functional Only)

Name	Null	Type	Description of Content
USER	No	VARCHAR2(10)	Internal CMIS user identifier.
PROJECT	No	VARCHAR2(8)	Automated information system identifier.
USER_TYPE	No	VARCHAR2(1)	CMIS user's 1 byte type code "0" = Release Manager, "1" = Technical Employee, "2" = Technical Action Manager, "3" = Technical Change Coordinator, "4" = Technical Change Coordinator/Action Manager, "5" = Technical Configuration Manager, "6" = Technical Remote User, "7" = Technical Higher Authority, "9" = Functional Employee, "A" = Functional Action Manager, "B" = Functional Change Coordinator, "C" = Functional Change Coordinator/Action Manager, "D" = Functional Remote User, "E" = CMIS Administrator
RTNG_SEQ	Yes	VARCHAR2(2)	Serial routing sequence number.
SEC_CLASS	No	VARCHAR2(10)	Security classification identifier.
CCB_MEMBER	No	VARCHAR2(1)	CCB member indicator "Y" = User is a CCB member, "N" = User is not a CCB member
FUN_TEC_ID	No	VARCHAR2(1)	Functional/Technical organization code "F" = Functional "T" = Technical
LAST_LOGON_DT	Yes	DATE	Date when user last logged on to CMIS.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_FUNC_USER_UNAVAIL_V - Resource Unavailability (Functional Only)

Name	Null	Type	Description of Content
USER	No	VARCHAR2(10)	Internal CMIS user identifier.
UNAVAIL_RE	No	VARCHAR2(2)	Reason the user is unavailable "AL" = Annual Leave "SL" = Sick Leave "TD" = Temporary Duty "MD" = Military Duty "OU" = Other Unavailable "OW" = Other Work "TG" = Training
FROM_DATE	No	DATE	Starting date of unavailability.
TO_DATE	No	DATE	Ending date of unavailability.
NO_OF_HRS	Yes	NUMBER(5)	Number of working hours of unavailability.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_MAIL_GROUP_V - Group IDs for Message Addressing

Name	Null	Type	Description of Content
------	------	------	------------------------

USER_ID	Yes	VARCHAR2(10)	Internal CMIS user identifier of group owner.
GROUP_ID	Yes	VARCHAR2(10)	Internal CMIS mail group identifier.
GUSER_ID	Yes	VARCHAR2(10)	Internal CMIS user identifier of group member.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_MAIL_V - Internal CMIS Messages

Name	Null	Type	Description of Content
USER	Yes	VARCHAR2(10)	Internal CMIS user identifier of recipient of mail message.
DATE_SENT	Yes	DATE	Date message was sent.
TIME_SENT	Yes	VARCHAR2(5)	Time message was sent.
VIEWED_MSG	Yes	VARCHAR2(1)	Has the message been viewed indicator “Y” = Yes the message has been viewed, “N” = No the message has never been viewed.
FROM_NAME	Yes	VARCHAR2(10)	Internal CMIS user identifier of sender of mail message.
FWD_FROM	Yes	VARCHAR2(30)	Internal CMIS user’s full name of user who sent the message.
MESSAGE_X	Yes	VARCHAR2(2000)	Text of message.
MSG_TYPE	Yes	VARCHAR2(6)	Message type indicator “USER” = Notify message, “SYSTEM” = To do message.
PROJECT_ID	Yes	VARCHAR2(8)	AIS identifier to which the message applies.
SCR_ID	Yes	VARCHAR2(8)	SCR identifier to which the message applies.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date mail message was sent.

CMISPB_PTR_DEF_V - Problem Trouble Reports

Name	Null	Type	Description of Content
PTR_NUM	No	VARCHAR2(5)	PTR identifier.
PTR_TYPE	Yes	VARCHAR2(5)	PTR type code.
PTR_REQ_AC	No	VARCHAR2(19)	Reporting organizational activity.
UIC	No	VARCHAR2(5)	Unit identification code.
SYS	No	VARCHAR2(8)	Automated information system identifier.
SYS_SUB	No	VARCHAR2(10)	Automated information system subsystem identifier.
REQ_PRI	Yes	VARCHAR2(1)	Required priority.
POC_NAME	Yes	VARCHAR2(30)	Point of contact’s name.
POC_CODE	Yes	VARCHAR2(6)	Point of contact’s employing activity organizational code.
POC_TELAV	Yes	VARCHAR2(10)	Point of contact’s DSN telephone number.
POC_TELCM	Yes	VARCHAR2(10)	Point of contact’s commercial telephone number.
CUST_CTRL	Yes	VARCHAR2(15)	Customer control number.
PTR_TITLE	No	VARCHAR2(68)	Title of PTR.
REL_NUM	Yes	VARCHAR2(5)	Release identifier
RECD_DATE	Yes	DATE	Date PTR was received.
RECD_TIME	Yes	VARCHAR2(5)	Time PTR was received.
RECD_BY	No	VARCHAR2(30)	Internal CMIS user’s full name of the user who received the PTR..
REQ_DATE	Yes	DATE	Date PTR is required to be fixed.
PTR_STAT	No	VARCHAR2(3)	PTR status.
REFER	Yes	VARCHAR2(30)	Internal CMIS user’s full name to whom the PTR was referred.

Name	Null	Type	Description of Content
REFER_CODE	Yes	VARCHAR2(5)	Employing activity organizational code of the CMIS user to whom the PTR was referred.
REFER_DATE	Yes	DATE	Date PTR was referred.
DESCRIP	Yes	VARCHAR2(2000)	Textual description of problem.
ACTION	Yes	VARCHAR2(2000)	Textual description of resolution of problem.
RESOL_DATE	Yes	DATE	Date PTR was resolved.
NUM_PRG	Yes	NUMBER(3)	Number of programs affected (required to be changed) by PTR.
NUM_ECL	Yes	NUMBER(3)	Number of ECL(s) affected (required to be changed) by PTR.
STAFF_HRS	Yes	NUMBER(5)	Number of staff hours required to resolve PTR.
PARNTCHILD	Yes	VARCHAR2(1)	Parent child indicator “ ” = PTR is neither a parent nor a child, “P” = PTR is a parent, “C” = PTR is a child.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date PTR was received.

CMISPB_PTR_DEF_VX - Working View of Problem Trouble Reports used to gather information for use in other views

Name	Null	Type	Description of Content
PTR_DEF_KEY_SEQ	No	NUMBER(10)	Oracle primary key of PTR.
PTR_NUM	No	VARCHAR2(5)	PTR identifier.
PTR_TYPE	Yes	VARCHAR2(5)	PTR type code.
PTR_REQ_AC	No	VARCHAR2(19)	Reporting organizational activity.
UIC	No	VARCHAR2(5)	Unit identification code.
SYS	No	VARCHAR2(8)	Automated information system identifier.
SYS_SUB	No	VARCHAR2(10)	Automated information system subsystem identifier.
REQ_PRI	Yes	VARCHAR2(1)	Required priority.
POC_NAME	Yes	VARCHAR2(30)	Point of contact's name.
POC_CODE	Yes	VARCHAR2(6)	Point of contact's employing activity organizational code.
POC_TELAV	Yes	VARCHAR2(10)	Point of contact's DSN telephone number.
POC_TELCM	Yes	VARCHAR2(10)	Point of contact's commercial telephone number.
CUST_CTRL	Yes	VARCHAR2(15)	Customer control number.
PTR_TITLE	No	VARCHAR2(68)	Title of PTR.
REL_NUM	Yes	VARCHAR2(5)	Release identifier
ACT_REL_DT	Yes	DATE	Actual release date.
RECD_DATE	Yes	DATE	Date PTR was received.
RECD_TIME	Yes	VARCHAR2(5)	Time PTR was received.
RECD_BY	No	VARCHAR2(30)	Full name of the internal CMIS user who received the PTR.
REQ_DATE	Yes	DATE	Date PTR is required to be fixed.
PTR_STAT	No	VARCHAR2(3)	PTR status.
REFER	Yes	VARCHAR2(30)	Full name of the internal CMIS user to whom the PTR was referred.
REFER_CODE	Yes	VARCHAR2(5)	Employing activity organizational code of the CMIS user to whom the PTR was referred.
REFER_DATE	Yes	DATE	Date PTR was referred.
PTR_TEXT_SEQ	Yes	NUMBER(10)	Oracle primary key of textual description of problem.

Name	Null	Type	Description of Content
PTR_ACTION_T EXT_SEQ	Yes	NUMBER(10)	Oracle primary key of textual description of resolution of problem.
RESOL_DATE	Yes	DATE	Date PTR was resolved.
NUM_PRG	Yes	NUMBER(3)	Number of programs affected (required to be changed) by PTR.
NUM_ECL	Yes	NUMBER(3)	Number of ECL(s) affected (required to be changed) by PTR.
STAFF_HRS	Yes	NUMBER(5)	Number of staff hours required to resolve a PTR.
PARNTCHILD	Yes	VARCHAR2(1)	Parent child indicator “ ” = PTR is neither a parent nor a child “P” = PTR is a parent, “C” = PTR is a child.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date PTR was received.

CMISPB_PTR_XREF_V - Problem Trouble Reports Parent to Child Relationship

Name	Null	Type	Description of Content
PARENT_AIS	No	VARCHAR2(8)	AIS identifier of parent PTR.
PARENT_PTR	No	VARCHAR2(5)	PTR identifier of parent PTR.
CHILD_AIS	No	VARCHAR2(8)	AIS identifier of child PTR.
CHILD_PTR	No	VARCHAR2(5)	PTR identifier of child PTR.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date PTR was received.

CMISPB_RELEASE_AUDIT_V - Locked Release Audit Data

Name	Null	Type	Description of Content
REL_NUM	No	VARCHAR2(5)	Release identifier
BASELINED	Yes	NUMBER(4)	Number of SCR's in release when the release was locked.
ADD_TO_BSL	Yes	NUMBER(4)	Number of SCR's added to the release since it was locked.
REM_FM_BSL	Yes	NUMBER(4)	Number of SCR's removed from the release since it was locked.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release was certified.

CMISPB_RELEASE_TDR_ROUTING_V - System Testing Trouble Deficiency Report Routing

Name	Null	Type	Description of Content
REL_NUM	No	VARCHAR2(5)	Release identifier
TYPE_TEST	No	VARCHAR2(12)	Release/System testing test level identifier.
UNIQUE_KEY		CHAR(2)	(No longer used within CMIS.)
EVENT_ID	No	VARCHAR2(12)	Release/System testing test event identifier.
PDR_ID		VARCHAR2(3)	Release/System testing TDR identifier.
FRM_USERID	No	VARCHAR2(10)	Internal CMIS user identifier of sender.
TO_USERID	No	VARCHAR2(10)	Internal CMIS user identifier of recipient.

Name	Null	Type	Description of Content
DATE_SENT	No	DATE	Date Release/System testing TDR was sent to the recipient.
DATE_RETRN	Yes	DATE	Date Release/System testing TDR was returned from recipient.
NOTES	Yes	VARCHAR2(2000)	Textual notes.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing release/system testing TDR) was certified.

CMISPB_RELEASE_TDR_SCR_CI_V - System Testing Identified System Change Requests & Configuration Items

Name	Null	Type	Description of Content
REL_NUM	Yes	VARCHAR2(5)	Release identifier
TYPE_TEST	Yes	VARCHAR2(12)	Release/System testing test level identifier.
UNIQUE_KEY	Yes	CHAR(2)	(No longer used within CMIS.)
SCR_NUM	Yes	VARCHAR2(5)	Release/System change request identifier.
AMEND_NUM	Yes	VARCHAR2(2)	Release/System change request amendment number.
CTRL_PREFX	Yes	VARCHAR2(2)	Configuration item type identifier.
CTRL_UNIT	Yes	VARCHAR2(40)	Configuration item identifier.
EVENT_ID	Yes	VARCHAR2(12)	Release/System testing test event identifier.
PDR_ID	Yes	VARCHAR2(3)	Release/System testing TDR identifier.
ASSIGN_TO	Yes	VARCHAR2(10)	Internal CMIS User Identifier.
STAFF_HRS	Yes	NUMBER	Estimated number of hours to change the CI.
CHG_SIZE	Yes	NUMBER	Estimated size or change to change the CI.
CCO_CREATD	Yes	VARCHAR2(1)	Has the CCO been created flag. “Y” = CCO has been created, “N” = CCO has not been created.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS Identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR testing TDR) was certified.

CMISPB_RELEASE_TDR_V - System Testing Test Deficiency Reports

Name	Null	Type	Description of Content
REL_NUM	No	VARCHAR2(5)	Release identifier of system testing TDR
TYPE_TEST	No	VARCHAR2(12)	Release/System testing test level identifier.
UNIQUE_KEY	Yes	CHAR(2)	(No longer used within CMIS.)
EVENT_ID	No	VARCHAR2(12)	Release/System testing test event identifier.
PDR_ID	Yes	VARCHAR2(3)	Release/System testing TDR identifier.
DETAILS	Yes	VARCHAR2(2000)	Textual description of technical deficiency.
ORIGINATOR	Yes	VARCHAR2(2000)	Internal CMIS user identifier.
INIT_DATE	No	DATE	Date TDR was created.
RESOL_DATE	Yes	DATE	Date TDR was returned from all routings.
RETEST_DTE	Yes	DATE	Date TDR was certified as fixed/corrected.
CANCEL_DTE	Yes	DATE	Date TDR was cancelled.
TRANS_DATE	Yes	DATE	Date TDR was transferred.
PRIORITY	Yes	VARCHAR2(1)	Priority of TDR. “1” = Highest, “2” = High-Moderate, “3” = Moderate, “4” = Moderate-Low,

Name	Null	Type	Description of Content
			"5" = Low
CRITICALTY	Yes	VARCHAR2(1)	Criticality of TDR. "1" = Most, "2" = Most-Moderate, "3" = Moderate, "4" = Moderate-Least, "5" = Least
REPEAT_IND	Yes	VARCHAR2(1)	Was the TDR returned and not resolved requiring the creation of another TDR. "Y" = The TDR was not resolved and another TDR was created. "N" = The TDR was resolved and another TDR was not created.
PT_REL_NUM	Yes	VARCHAR2(5)	Release identifier where release/system testing TDR has been transferred or copied.
PT_TST_LVL	Yes	VARCHAR2(12)	Release/System testing test level of created TDR.
PT_UNIQKEY	Yes	CHAR(2)	(No longer used within CMIS.)
PT_TST_EVT	Yes	VARCHAR2(12)	Release/System testing test event of created TDR.
PT_TDR_ID	Yes	VARCHAR2(3)	Release/System testing TDR identifier of created TDR.
SUSPT_ORIG	Yes	CHAR(15)	Suspected origin of TDR. "CM/RM", "Code", "Database", "Design", "JCL", "Requirements", "Systems", "Test"
ACTUL_ORIG	Yes	VARCHAR2(15)	Suspected origin of TDR. "CM/RM", "Code", "Database", "Design", "JCL", "Requirements", "Systems", "Test"
RESOL_CODE	Yes	VARCHAR2(1)	TDR status code. "I" = TDR is initiated "W" = TDR has been forwarded "R" = TDR has been returned "C" = TDR has been cancelled "D" = TDR has been deferred "F" = TDR has been fixed/corrected "N" = TDR has been not fixed "T" = TDR has been transferred "V" = TDR has been converted to an SCR
RESOL_TEXT	Yes	VARCHAR2(2000)	Textual description of resolution of TDR
DEFER_DATE	Yes	DATE	Date TDR was deferred.
CONVERTED_DT	Yes	DATE	Date the TDR was converted to an SCR.

Name	Null	Type	Description of Content
SCR_ID	Yes	VARCHAR2(8)	The SCR ID (Xnnnn-nn) that was created as a result of the convert to SCR function.
SYS_LIMIT	No	VARCHAR2(8)	AIS Identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing release/system testing TDR) was certified.

CMISPB_RELEASE_TEST_EVENT_V - System Testing Events

Name	Null	Type	Description of Content
REL_NUM	No	VARCHAR2(5)	Release identifier
TYPE_TEST	No	VARCHAR2(12)	Release/System testing test level identifier.
UNIQUE_KEY	Yes	CHAR(2)	(No longer used within CMIS.)
EVENT_ID	No	VARCHAR2(12)	Release/System testing test event identifier.
START_DATE	Yes	DATE	Actual start date of release/system testing test event.
END_DATE	Yes	DATE	Actual end date of release/system testing test event.
RESULTS	Yes	VARCHAR2(1)	Results of release/system testing test event. “ “ = The Release/System testing test event is not closed, “Y” = The Release/System testing test event passed, “N” = The Release/System testing test event failed.
DETAILS	Yes	VARCHAR2(2000)	Textual description of release/system testing test event
ASGN_PDRID	Yes	VARCHAR2(3)	Next assignable release/system testing TDR identifier.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing release/system testing test event) was certified.
ASSIGN_TO	Yes	VARCHAR2(10)	Internal CMIS user identifier.
ASSN_CODE	Yes	VARCHAR2(5)	Organizational code of CMIS user.
CTRL_FN_TC	Yes	VARCHAR2(1)	Functional/Technical organization code "F" = Functional "T" = Technical
STAFF_HRS	Yes	NUMBER(5)	Estimated number of staff hours to be expended for the release/system testing test event.
ACTUAL_HRS	Yes	NUMBER(5)	Actual number of staff hours expended for the release/system testing test event.
CHG_SIZE	Yes	NUMBER(2)	Estimated size of change to be expended for the release/system testing test event.
ACT_CHGSIZE	Yes	NUMBER(2)	Actual size of change expended for the release/system testing test event.
TEST_EVENT_PRIORITY	Yes	VARCHAR2(1)	Test event priority.
TEST_EVENT_SEQUENCE	Yes	VARCHAR2(3)	Test event sequence.

Name	Null	Type	Description of Content
TEST_EVENT_CHANGE_NUMBER	Yes	VARCHAR2(8)	Test event change number.
TEST_EVENT_RECORD_ID	Yes	VARCHAR2(10)	Test event record identifier.
TEST_EVENT_FWD_STATUS_CD	Yes	VARCHAR2(1)	Test event
CHECK_FWD_STATUS_CD	Yes	VARCHAR2(1)	Indicates the "TEST_EVENT_FWD_STATUS_CD" may not be valid. " " = The "TEST_EVENT_FWD_STATUS_CD" is valid. "P" = Test plan review routing may have caused the "TEST_EVENT_FWD_STATUS_CD" to be invalid. "O" = Test output review routing may have caused the "TEST_EVENT_FWD_STATUS_CD" to be invalid.

CMISPB_RELEASE_TEST_V - System Testing Tests

Name	Null	Type	Description of Content
REL_NUM	No	VARCHAR2(5)	Release identifier
TYPE_TEST	No	VARCHAR2(12)	Release/System testing test level identifier.
UNIQUE_KEY	Yes	CHAR(2)	(No longer used within CMIS.)
START_DATE	Yes	DATE	Actual start date of release/system testing test level.
END_DATE	Yes	DATE	Actual end date of release/system testing test level.
RESULTS	Yes	VARCHAR2(1)	Results of release/system testing test level. " " = The release/system testing test level is not closed, "Y" = The release/system testing test level passed, "N" = The release/system testing test level failed.
TEST_FWD_STATUS_CD	No	VARCHAR2(1)	Review test plan - Review test output routing status code: "0" = Pending "1" = Review Plan "2" = Returned Plan "3" = Accept Plan "4" = Reject Plan "5" = Review Output "6" = Returned Output "7" = Accept Output "8" = Reject Output
CHECK_FWD_STATUS_CD	Yes	VARCHAR2(1)	Indicates the "TEST_EVENT_FWD_STATUS_CD" may not be valid. " " = The "TEST_EVENT_FWD_STATUS_CD" is valid. "P" = Test plan review routing may have caused the "TEST_EVENT_FWD_STATUS_CD" to be invalid. "O" = Test output review routing may have caused the "TEST_EVENT_FWD_STATUS_CD" to be invalid.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing release/system testing test) was certified.

CMISPB_REL_TESTS_AND_EVENTS_V - System Testing Tests & Events

Name	Null	Type	Description of Content
REL_NUM	Yes	VARCHAR2(5)	Release identifier
TYPE_TEST	Yes	VARCHAR2(12)	Release/System testing test level identifier.
UNIQUE_KEY	Yes	CHAR(2)	(No longer used within CMIS.)
EVENT_ID	Yes	VARCHAR2(12)	Release/System testing test event identifier.
START_DATE	Yes	DATE	Actual start date of release/system testing test event.
END_DATE	Yes	DATE	Actual end date of release/system testing test event.
RESULTS	Yes	VARCHAR2(1)	Results of release/system testing test event. “ “ = The release/system testing test event is not closed, “Y” = The release/system testing test event passed, “N” = The release/system testing test event failed.
TEST_FWD_STATUS_CD	Yes	VARCHAR2(1)	Review test plan – Review test output routing status code: “0” = Pending “1” = Review Plan “2” = Returned Plan “3” = Accept Plan “4” = Reject Plan “5” = Review Output “6” = Returned Output “7” = Accept Output “8” = Reject Output
TEST_LEVEL_CHECK_FWD_STATUS_CD	Yes	VARCHAR2(1)	Indicates the “TEST_FWD_STATUS_CD” may not be valid. “ “ = The “TEST_FWD_STATUS_CD” is valid. “P” = Test plan review routing may have caused the “TEST_FWD_STATUS_CD” to be invalid. “O” = Test output review routing may have caused the “TEST_FWD_STATUS_CD” to be invalid.
DETAILS	Yes	VARCHAR2(2000)	Textual description of release/system testing test event
ASGN_PDRID	Yes	VARCHAR2(3)	Next assignable release/system testing TDR identifier.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing system testing test and/or event) was certified.
ASSIGN_TO	Yes	VARCHAR2(10)	Internal CMIS user identifier.
ASSN_CODE	Yes	VARCHAR2(5)	Organizational code of CMIS user.
CTRL_FN_TC	Yes	VARCHAR2(1)	Functional/Technical organization code "F" = Functional "T" = Technical
STAFF_HRS	Yes	NUMBER	Estimated number of staff hours to be expended for the release/system testing test event.
ACTUAL_HRS	Yes	NUMBER	Actual number of staff hours expended for the release/system testing test event.
CHG_SIZE	Yes	NUMBER	Estimated size of change to be expended for the release/system testing test event.
ACT_CHGSIZE	Yes	NUMBER	Actual size of change expended for the release/system testing test event.

Name	Null	Type	Description of Content
TEST_EVENT_PRIORITY	Yes	VARCHAR2(1)	Test event priority.
TEST_EVENT_SEQUENCE	Yes	VARCHAR2(3)	Test event sequence.
TEST_EVENT_CHANGE_NUMBER	Yes	VARCHAR2(8)	Test event change number.
TEST_EVENT_RECORD_ID	Yes	VARCHAR2(10)	Test event record identifier.
TEST_EVENT_FWD_STATUS_CD	Yes	VARCHAR2(1)	Test event
TEST_EVENT_CHECK_FWD_STATUS_CD	Yes	VARCHAR2(1)	Indicates the “TEST_EVENT_FWD_STATUS_CD” may not be valid. “ “ = The “TEST_EVENT_FWD_STATUS_CD” is valid. “P” = Test plan review routing may have caused the “TEST_EVENT_FWD_STATUS_CD” to be invalid. “O” = Test output review routing may have caused the “TEST_EVENT_FWD_STATUS_CD” to be invalid.

CMISPB_SCR_APP_V - System Change Request Approval

Name	Null	Type	Description of Content
SCR_NUM	No	VARCHAR2(5)	System change request identifier.
AMEND_NUM	No	VARCHAR2(2)	System change request amendment number.
TYPE_APPR	No	VARCHAR2(2)	SCR approval type/reason. “0E” = Initial Entry, “1E” = Supervisor, “2P” = PCC, “3F” = Functional Analysis, “3T” = Technical Analysis, “3V” = Requirements Review, “3W” = Requirements Rewrite, “4I” = Initial Impacting, “5H” = Higher Authority, “6F” = Final Impacting, “7L” = Locked, “9Q” = CM Certified, “0R” = Requirements Analysis, “2T” = Transfer Control
SEQ_NO	Yes	VARCHAR2(2)	SCR approval sequence number, used for serial routings/approvals only. “01-99” = Serial routing was employed, “00” = Shot gun routing was employed.
USER	No	VARCHAR2(10)	Internal CMIS user identifier of recipient.
NAME	No	VARCHAR2(30)	Internal CMIS user full name of recipient.
DATE_SENT	Yes	DATE	Date SCR approval/routing was sent to recipient.
A_R_DATE	Yes	DATE	Date SCR approval/routing was returned from recipient.
ACTION_CD	Yes	VARCHAR2(1)	Approved/Rejected action code “A” = Approved,

Name	Null	Type	Description of Content
			"R" = Rejected.
NOTES	Yes	VARCHAR2(2000)	Approval notes.
SENT_FROM	Yes	VARCHAR2(10)	Internal CMIS user identifier of sender.
SENT_NAME	Yes	VARCHAR2(30)	Internal CMIS user full name of sender.
REL_NUM	No	VARCHAR2(5)	Release identifier
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR approval) was certified.

**CMISPB_SCR_PTR_XREF_V - System Change Request to Program Trouble
Report Cross Reference Data**

Name	Null	Type	Description of Content
PTR_NUM	No	VARCHAR2(5)	PTR identifier.
SCR_NUM	No	VARCHAR2(5)	System change request identifier.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR) was certified.

**CMISPB_SCR_TDR_CI_V - System Change Request Testing Identified
Configuration Items**

Name	Null	Type	Description of Content
SCR_NUM	No	VARCHAR2(5)	System change request identifier.
AMEND_NUM	No	VARCHAR2(2)	System change request amendment number.
UNIQUE_KEY	Yes	VARCHAR2(2)	(No longer used within CMIS.)
CTRL_PREFX	No	CHAR(2)	Configuration item type identifier.
CTRL_UNIT	No	VARCHAR2(40)	Configuration item identifier.
EVENT_ID	No	VARCHAR2(12)	SCR testing test event identifier.
PDR_ID	Yes	VARCHAR2(3)	SCR testing TDR identifier.
ASSIGN_TO	Yes	VARCHAR2(10)	Internal CMIS user identifier.
STAFF_HRS	No	NUMBER(5)	Estimated number of hours to change the CI.
CHG_SIZE	No	NUMBER(5)	Estimated size or change to change the CI.
CCO_CREATD	No	VARCHAR2(1)	Has the CCO been created flag. "Y" = CCO has been created, "N" = CCO has not been created.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR testing TDR CI) was certified.

**CMISPB_SCR_TDR_ROUTING_V - System Change Request Testing Trouble
Deficiency Report Routings**

Name	Null	Type	Description of Content
SCR_NUM	No	VARCHAR2(5)	System change request identifier.
AMEND_NUM	No	VARCHAR2(2)	System change request amendment number.
UNIQUE_KEY	Yes	CHAR(2)	(No longer used within CMIS.)
EVENT_ID	No	VARCHAR2(12)	SCR testing test event identifier.
PDR_ID	Yes	VARCHAR2(3)	SCR testing TDR identifier.
FRM_USERID	No	VARCHAR2(10)	Internal CMIS user identifier of sender.
TO_USERID	No	VARCHAR2(10)	Internal CMIS user identifier of recipient.
DATE_SENT	No	DATE	Actual date SCR TDR was sent to the recipient.

DATE_RETRN	Yes	DATE	Actual date SCR TDR was returned from the recipient.
NOTES	Yes	VARCHAR2(2000)	Textual notes.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR testing TDR) was certified.

CMISPB_SCR_TDR_V - System Change Request Testing Test Deficiency Report

Name	Null	Type	Description of Content
SCR_NUM	No	VARCHAR2(5)	System change request identifier.
AMEND_NUM	No	VARCHAR2(2)	System change request amendment number.
UNIQUE_KEY	Yes	VARCHAR2(2)	(No longer used within CMIS.)
EVENT_ID	No	VARCHAR2(12)	SCR testing test event identifier.
PDR_ID	Yes	VARCHAR2(3)	SCR testing TDR identifier.
DETAILS	Yes	VARCHAR2(2000)	Textual description of technical deficiency.
ORIGINATOR	No	VARCHAR2(10)	Internal CMIS user identifier.
INIT_DATE	No	DATE	Date TDR was created.
RESOL_DATE	Yes	DATE	Date TDR was resolved.
RETEST_DTE	Yes	DATE	Date TDR was certified as fixed/corrected.
CANCEL_DTE	Yes	DATE	Date TDR was cancelled.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR testing TDR) was certified.

CMISPB_SCR_TEST_AND_EVENTS_V - System Change Request Testing Tests & Events

Name	Null	Type	Description of Content
SCR_NUM	Yes	VARCHAR2(5)	System change request identifier.
AMEND_NUM	Yes	VARCHAR2(2)	System change request amendment number.
UNIQUE_KEY	Yes	VARCHAR2(2)	(No longer used within CMIS.)
EVENT_ID	Yes	VARCHAR2(12)	SCR testing test event identifier.
START_DATE	Yes	DATE	Actual date SCR test event was started.
END_DATE	Yes	DATE	Actual date SCR test event was completed.
RESULTS	Yes	VARCHAR2(1)	Results of SCR test event. “ “ = SCR test event is not closed, “Y” = SCR test event passed, “N” = SCR test event failed.
DETAILS	Yes	VARCHAR2(2000)	Textual description of SCR testing test event.
ASGN_PDRID	Yes	VARCHAR2(3)	Next assignable TDR identifier.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR testing test and/or event) was certified.

CMISPB_SCR_TEST_EVENTS_V - System Change Request Testing Events

Name	Null	Type	Description of Content
SCR_NUM	No	VARCHAR2(5)	System change request identifier.
AMEND_NUM	No	VARCHAR2(2)	System change request amendment number.
UNIQUE_KEY	Yes	VARCHAR2(2)	(No longer used within CMIS.)
EVENT_ID	No	VARCHAR2(12)	SCR testing test event identifier.
START_DATE	Yes	DATE	Actual date SCR test event was started.

Name	Null	Type	Description of Content
END_DATE	Yes	DATE	Actual date SCR test event was completed.
RESULTS	Yes	VARCHAR2(1)	Results of SCR test event. “ “ = SCR test event is not closed, “Y” = SCR test event passed, “N” = SCR test event failed.
DETAILS	Yes	VARCHAR2(2000)	Textual description of SCR testing test event.
ASGN_PDRID	Yes	VARCHAR2(3)	Next assignable TDR identifier.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR testing event) was certified.

CMISPB_SCR_TEST_V - System Change Request Testing Tests

Name	Null	Type	Description of Content
SCR_NUM	No	VARCHAR2(5)	System change request identifier.
AMEND_NUM	No	VARCHAR2(2)	System change request amendment number.
UNIQUE_KEY	Yes	VARCHAR2(2)	(No longer used within CMIS.)
EVENT_ID	Yes	VARCHAR(12)	Blank.
START_DATE	Yes	DATE	Actual date SCR test was started.
END_DATE	Yes	DATE	Actual date SCR test was completed.
RESULTS	Yes	VARCHAR2(1)	Results of SCR test. “ “ = SCR test is not closed, “Y” = SCR test passed, “N” = SCR test failed.
DETAILS	Yes	CHAR(0)	Blank.
ASGN_PDRID	Yes	CHAR(3)	Blank.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR testing test) was certified.

CMISPB_SCR_TEXT_V - System Change Requests Text

Name	Null	Type	Description of Content
SCR_NUM	No	VARCHAR2(5)	System change request identifier.
AMEND_NUM	No	VARCHAR2(2)	System change request amendment number.
UIC	Yes	CHAR(5)	Unit identification code.
DESCRIPT	Yes	VARCHAR2(2000)	Textual description of requirement definition.
ANALYSIS	Yes	VARCHAR2(2000)	Textual description of functional analysis.
TECH_ANLY	Yes	VARCHAR2(2000)	Textual description of technical analysis.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR text) was certified.

CMISPB_SCR_V - System Change Requests

Name	Null	Type	Description of Content
SCR_NUM	Yes	VARCHAR2(5)	System change request identifier.
AMEND_NUM	Yes	VARCHAR2(2)	System change request amendment number.
AMEND_TOTL	Yes	NUMBER	Total number of amendments for the SCR.
SCR_REQ_AC	Yes	VARCHAR2(19)	Requesting organizational activity's name.
UIC	Yes	CHAR(5)	Unit identification code.
SYS	Yes	VARCHAR2(8)	Automated information system identifier.

Name	Null	Type	Description of Content
SYS_SUB	Yes	CHAR(10)	Automated information system subsystem identifier.
SCR_CAT	Yes	VARCHAR2(1)	SCR category code "M" = Maintenance "X" = Emergency "R" = Regulatory "P" = Policy "E" = Enhancement "A" = Enhancement/Migratory "T" = Technical
SUB_CAT	Yes	CHAR(2)	SCR sub-category.
RANK_SEQNO	Yes	NUMBER	Ranking sequence number.
POC_NAME	Yes	VARCHAR2(30)	Point of contact's name.
POC_CODE	Yes	VARCHAR2(6)	Point of contact's employing activity organizational code.
POC_TELAV	Yes	VARCHAR2(10)	Point of contact's DSN telephone number.
POC_TELCM	Yes	VARCHAR2(10)	Point of contact's commercial telephone number.
CUST_CTRL	Yes	CHAR(15)	Customer control number.
SCR_TITLE	Yes	VARCHAR2(68)	Title of SCR.
PREPARER	Yes	CHAR(30)	Name of user who prepared SCR.
REL_NUM	Yes	VARCHAR2(5)	Release identifier
TARG_RELNO	Yes	VARCHAR2(5)	Target release identifier
RECD_DATE	Yes	DATE	Date SCR was received.
REQ_DATE	Yes	DATE	Date SCR must be implemented.
PREP_DATE	Yes	DATE	Date SCR was prepared.
SCR_STAT_P	Yes	VARCHAR2(3)	SCR's primary status.
LST_MOD_DT	Yes	DATE	Date SCR was last modified.
SCR_STAT_S	Yes	VARCHAR2(3)	SCR's secondary status.
WBS_LVL_1	Yes	CHAR(6)	Work breakdown schedule level 1.
WBS_LVL_2	Yes	CHAR(6)	Work breakdown schedule level 2.
STAFF_HRS	Yes	NUMBER	Sum of the estimated number of hours from all the CCO's attached to the SCR.
CTRL_FN_TC	Yes	VARCHAR2(1)	Functional/Technical organization code "F" = Functional "T" = Technical
PARNTCHILD	Yes	CHAR(1)	Parent child indicator " " = PTR is neither a parent nor a child. "P" = PTR is a parent. "C" = PTR is a child.
AC_CEN_CD	Yes	VARCHAR2(2)	Accounting center code "XX" = Non-DFAS, "FI" = DFAS-IN, "FR" = DFAS-CL, "FD" = DFAS-DE, "CC" = DFAS-CO, "FK" = DFAS-KC, "HQ" = DFAS-HQ
AC_FUN_TY	Yes	VARCHAR2(1)	Accounting fund type " " = Not Specified "O" = Operating, "C" = Capital
AC_CST_AC	Yes	VARCHAR2(4)	Accounting cost account code
AC_PRJ_CD	Yes	VARCHAR2(3)	Accounting project code
AC_YEAR	Yes	VARCHAR2(4)	Accounting year

Name	Null	Type	Description of Content
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR) was certified.

CMISPB_SCR_VX - Working View of System Change Request Data - used to gather information for use in other views

Name	Null	Type	Description of Content
SCR_DEF_KEY_SEQ	No	NUMBER(10)	Oracle primary key of SCR.
SCR_SEQ	No	VARCHAR2(5)	System change request identifier.
SCR_AMEND_SEQ	No	VARCHAR2(2)	System change request amendment number.
SCR_UIC_CD	Yes	CHAR(5)	Unit identification code.
REL_NUM	No	VARCHAR2(5)	Release identifier
ACTUAL_RELEASE_DT	Yes	DATE	Actual release date.
TARG_REL_NUM	No	VARCHAR2(5)	Target release identifier
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR testing event) was certified.

CMISPB_SCR_XREF_V - System Change Request Parent to Child Relationship

Name	Null	Type	Description of Content
PARENT_AIS	No	VARCHAR2(8)	Automated information system identifier of parent SCR.
PARENT_SCR	No	VARCHAR2(5)	SCR identifier of parent SCR.
CHILD_AIS	No	VARCHAR2(8)	Automated information system identifier of child SCR.
CHILD_SCR	No	VARCHAR2(5)	SCR identifier of child SCR.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing SCR) was certified.

CMISPB_TECH_ACTING_V - User Acting Designations (Technical Only)

Name	Null	Type	Description of Content
USER	No	VARCHAR2(10)	Internal CMIS user ID of user who has granted an acting assignment (Grantor).
ACT_USER	No	VARCHAR2(10)	Internal CMIS user ID of user who has been granted an acting assignment (Grantee).
ACT_NAME	No	VARCHAR2(30)	Internal CMIS name of user who has been granted an acting assignment (Grantee).
ACT_START	No	DATE	Actual start date of acting assignment.
ACT_END	No	DATE	Actual end date of acting assignment.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_TECH_AM_RELATION_V - Action Manager to Employee and Action Manager to Action Manager Cross Reference (Technical Only)

Name	Null	Type	Description of Content
PROJECT	Yes	VARCHAR2(8)	Automated information system identifier.
AM_USER	Yes	VARCHAR2(10)	Internal CMIS user identifier of action manager.
EMP_USER	Yes	VARCHAR2(10)	Internal CMIS user identifier of employee.
SUB_AMUSER	Yes	VARCHAR2(10)	Internal CMIS user identifier of subordinate action

			manager.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB TECH_CCO_V - Configuration Change Orders (Technical Only)

Name	Null	Type	Description of Content
SCR_NUM	No	VARCHAR2(5)	System change request identifier.
AMEND_NUM	No	VARCHAR2(2)	System change request amendment number.
UIC	Yes	CHAR(5)	Unit identification code.
QA_FLAG	Yes	VARCHAR2(2)	Quality assurance flag “ ” = Development CCO; “QA” = Test & Evaluation CCO; “RW” = Development Rework CCO; “RQ” = T&E Rework CCO; “TD” = CCO as the result of a TDR
CTRL_PREFX	No	CHAR(2)	Configuration item type identifier.
CTRL_UNIT	No	VARCHAR2(40)	Configuration item identifier.
ASSIGN_TO	Yes	VARCHAR2(10)	Internal CMIS user identifier.
ASSN_CODE	Yes	VARCHAR2(5)	Organizational code of CMIS user.
ACT_START	Yes	DATE	Actual start date of CCO.
ACT_END	Yes	DATE	Actual completion date of CCO.
REL_NUM	No	VARCHAR2(5)	Release identifier
UNIQUE_KEY	No	VARCHAR2(2)	A unique number within REL_NUM, QA_FLAG, CTRL_PREFX, CTRL_UNIT, & ASSIGN_TO.
DEL_SEQ	Yes	NUMBER(3)	(No longer used within CMIS.)
SYN_OF_CHG	Yes	VARCHAR2(2000)	Text description of changes to be made to CI.
ACTION	Yes	VARCHAR2(1)	Amendment CCO's action code NULL = CCO added on parent SCR "A" = Add "C" = Change "D" = Delete
STAFF_HRS	No	NUMBER(5)	Estimated number of hours to make changes to CI.
ACTUAL_HRS	Yes	NUMBER(5)	Actual number of hours expended to make changes to CI.
CHG_SIZE	Yes	NUMBER(2)	Estimated size of change to make changes to CI.
ACT_CHGSIZ	Yes	NUMBER(2)	Actual size of change expended to make changes to CI.
CTRL_FN_TC	No	VARCHAR2(1)	Functional/Technical organization code "F" = Functional "T" = Technical
FROM_AMDNO	Yes	VARCHAR2(2)	Amendment number where CCO was created “00” if CCO was created on SCR, not amendment.
CCO_PURPOSE	Yes	VARCHAR2(1)	Indicates the purpose of the CCO (i.e. “Initialize” or Create the CI; “Maintain” or Change the CI; “Remove” or Delete the CI from the AIS.) “I” = Initialize “M” = Maintain “R” = Remove
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.
DATE_LIMIT	Yes	DATE	Date release (containing CCO) was certified.

CMISPB_Tech_CMIS_USER_V - Internal CMIS User IDs Data (Technical Only)

Name	Null	Type	Description of Content
USER	No	VARCHAR2(10)	Internal CMIS user identifier.
NAME	No	VARCHAR2(30)	Internal CMIS user's full name.
CODE	No	VARCHAR2(5)	CMIS user's employing activity organizational code.
EMPNG_UIC	No	VARCHAR2(5)	Unit identification code of employing activity of CMIS user.
EMPNG_ACTV	No	VARCHAR2(19)	CMIS user's employing activity name.
LAST_LOGON_DT	Yes	DATE	Date when user last logged on to CMIS.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_Tech_MAIL_GROUP_V - Group IDs for Message Addressing (Technical Only)

Name	Null	Type	Description of Content
USER_ID	No	VARCHAR2(10)	Internal CMIS user identifier of group owner.
GROUP_ID	No	VARCHAR2(10)	Internal CMIS mail group identifier.
GUSER_ID	No	VARCHAR2(10)	Internal CMIS user identifier of group member.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_Tech_USER_ACCESS_V - Internal CMIS User ID to AIS Access Information (Technical Only)

Name	Null	Type	Description of Content
USER	No	VARCHAR2(10)	Internal CMIS user identifier.
PROJECT	No	VARCHAR2(8)	Automated information system identifier.
USER_TYPE	No	VARCHAR2(1)	CMIS user's 1 byte type code "0" = Release Manager, "1" = Technical Employee, "2" = Technical Action Manager, "3" = Technical Change Coordinator, "4" = Technical Change Coordinator/ Action Manager, "5" = Technical Configuration Manager, "6" = Technical Remote User, "7" = Technical Higher Authority, "9" = Functional Employee, "A" = Functional Action Manager, "B" = Functional Change Coordinator, "C" = Functional Change Coordinator/ Action Manager, "D" = Functional Remote User, "E" = CMIS Administrator
RTNG_SEQ	Yes	VARCHAR2(2)	Serial routing sequence number.
SEC_CLASS	No	VARCHAR2(10)	Security classification identifier.
CCB_MEMBER	No	VARCHAR2(1)	CCB member indicator "Y" = User is a CCB member, "N" = User is not a CCB member
FUN_TEC_ID	No	VARCHAR2(1)	Functional/Technical organization code "F" = Functional "T" = Technical
LAST_LOGON_DT	Yes	DATE	Date when user last logged on to CMIS.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_TECH_USER_UNAVAIL_V - Resource Unavailability (Technical Only)

Name	Null	Type	Description of Content
USER	No	VARCHAR2(10)	Internal CMIS user identifier.
UNAVAIL_RE	No	VARCHAR2(2)	Reason the user is unavailable "AL" = Annual Leave "SL" = Sick Leave "TD" = Temporary Duty "MD" = Military Duty "OU" = Other Unavailable "OW" = Other Work "TG" = Training
FROM_DATE	No	DATE	Starting date of unavailability.
TO_DATE	No	DATE	Ending date of unavailability.
NO_OF_HRS	Yes	NUMBER(5)	Number of working hours of unavailability.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

CMISPB_USER_ACCESS_V - Internal CMIS User ID to Automated Information System Access Information

Name	Null	Type	Description of Content
USER	Yes	VARCHAR2(10)	Internal CMIS user identifier.
PROJECT	Yes	VARCHAR2(8)	Automated information system identifier.
USER_TYPE	Yes	VARCHAR2(1)	CMIS user's 1 byte type code "0" = Release Manager, "1" = Technical Employee, "2" = Technical Action Manager, "3" = Technical Change Coordinator, "4" = Technical Change Coordinator/ Action Manager, "5" = Technical Configuration Manager, "6" = Technical Remote User, "7" = Technical Higher Authority, "9" = Functional Employee, "A" = Functional Action Manager, "B" = Functional Change Coordinator, "C" = Functional Change Coordinator/ Action Manager, "D" = Functional Remote User, "E" = CMIS Administrator
RTNG_SEQ	Yes	VARCHAR2(2)	Serial routing sequence number.
SEC_CLASS	Yes	VARCHAR2(10)	Security classification identifier.
CCB_MEMBER	Yes	VARCHAR2(1)	CCB member indicator "Y" = User is a CCB member, "N" = User is not a CCB member
FUN_TEC_ID	Yes	VARCHAR2(1)	Functional/Technical organization code "F" = Functional "T" = Technical
LAST_LOGON_DT	Yes	DATE	Date when user last logged on to CMIS.
SYS_LIMIT	Yes	VARCHAR2(8)	AIS identifier to which the data belongs.

**CMISPB_USER_SEC_VX - Working View of Internal CMIS User ID to Automated
Information System Access Information used to gather
information for use in other views**

Name	Null	Type	Description of Content
USER_SECURITY_KEY_SEQ	No	NUMBER(10)	Oracle primary key of user's security record.
CMIS_USER_KEY_SEQ	No	NUMBER(10)	Oracle primary key of user's user record
PROJECT_KEY_SEQ	No	NUMBER(10)	Oracle primary key of AIS record.
SEC_DELETED	No	VARCHAR2(1)	User security delete indicator "N" = Record is not deleted "Y" = Record is deleted
RTNG_SEQ	Yes	VARCHAR2(2)	Serial routing sequence number.
CCB_MEMBER	No	VARCHAR2(1)	CCB member indicator "Y" = User is a CCB member, "N" = User is not a CCB member
SEC_CLASS	No	VARCHAR2(10)	Security classification identifier.
USER_ID	No	VARCHAR2(10)	Internal CMIS user identifier.
USER_NAME	No	VARCHAR2(30)	Internal CMIS user's full name.
ORGANIZATION_CD	No	VARCHAR2(5)	CMIS user's employing activity organizational code.
USER_DELETED	No	VARCHAR2(1)	User delete indicator "N" = Record is not deleted "Y" = Record is deleted
USER_TYPE	No	VARCHAR2(1)	CMIS user's 1 byte type code "0" = Release Manager "1" = Technical Employee "2" = Technical Action Manager "3" = Technical Change Coordinator "4" = Technical Change Coordinator/Action Manager "5" = Technical Configuration Manager "6" = Technical Remote User "7" = Technical Higher Authority "9" = Functional Employee "A" = Functional Action Manager "B" = Functional Change Coordinator "C" = Functional Change Coordinator/Action Manager "D" = Functional Remote User "E" = CMIS Administrator
FUN_TECH_CD	No	VARCHAR2(1)	Functional/Technical organization code "F" = Functional "T" = Technical
DB_USER_ID	No	VARCHAR2(20)	Generic nomenclature for the CMIS user type (i.e., "Employee," "Action Manager," etc.)
PROJECT_DELETE_IND	No	VARCHAR2(1)	AIS delete indicator "N" = Record is not deleted "Y" = Record is deleted
CMIS_USER_DELETE_IND	No	VARCHAR2(1)	User delete indicator "N" = Record is not deleted "Y" = Record is deleted
USER_SECURITY_DELETE_IND	No	VARCHAR2(1)	User Security delete indicator "N" = Record is not deleted "Y" = Record is deleted

Name	Null	Type	Description of Content
LAST_LOGON_DT	Yes	DATE	Date when user last logged on to CMIS in this AIS.
SYS_LIMIT	No	VARCHAR2(8)	AIS identifier to which the data belongs.

Appendix E

List of Routings and Inherent Privileges

Routing Reasons	Inherent Privileges
Functional Analysis	<p>Allows user to update:</p> <ul style="list-style-type: none"> ◆ X-Ref PTR's ◆ SCR notes ◆ Functional analysis text ◆ SCR attachments ◆ Configuration Change Orders (CCO's)
Technical Analysis	<p>Allows user to update:</p> <ul style="list-style-type: none"> ◆ X-Ref PTR's ◆ SCR notes ◆ Technical analysis text ◆ SCR attachments ◆ Configuration Change Orders (CCO's)
Requirements Review	<p>This routing is solely for reviewing the SCR, typically before a Change Control Board (CCB) meeting.</p> <p>Allows user to update:</p> <ul style="list-style-type: none"> ◆ SCR notes ◆ CCB disposition
Requirements Rewrite	<p>Allows user to update:</p> <ul style="list-style-type: none"> ◆ X-Ref PTR's ◆ SCR notes ◆ Requirements definition text ◆ SCR attachments ◆ Configuration Change Orders (CCO's)
Requirements Analysis	<p>Allows user to update:</p> <ul style="list-style-type: none"> ◆ Sub-system ◆ Accounting data <ul style="list-style-type: none"> ● Center code ● Fund type ● Cost account code ● Project code ● Account year ◆ Category ◆ Sub-category ◆ Completion by

Routing Reasons	Inherent Privileges
	<ul style="list-style-type: none"> ◆ Prepared by ◆ Prepared date ◆ POC name ◆ POC code ◆ DSN & commercial phone numbers ◆ Requesting activity ◆ UIC ◆ Customer control number ◆ X-Ref PTR's ◆ SCR notes ◆ Requirements definition text ◆ Functional analysis text ◆ Technical analysis text ◆ SCR attachments ◆ Configuration Change Orders (CCO's)
Initial Impacting	<p>Allows user to update:</p> <ul style="list-style-type: none"> ◆ SCR notes ◆ SCR attachments ◆ Configuration Change Orders (CCO's)
Higher Authority	<p>Typically used to signify a funding shortfall. If the SCR threshold has been established and the SCR exceeds the threshold, then there must be a higher authority approval on the SCR with an "Approval" status before the release can be locked.</p> <p>Allows higher authority user to specify "Approval" or "Rejection" of the SCR when returning it to the TCC.</p> <p>Allows user to update:</p> <ul style="list-style-type: none"> ◆ SCR notes
Final Impacting	<p>Allows user to update:</p> <ul style="list-style-type: none"> ◆ SCR notes ◆ SCR attachments ◆ Configuration Change Orders (CCO's)
Transfer Control	<p>Allows Functional Change Coordinator to move the SCR from the functional organization to the technical organization giving full control of the SCR to the technical organization.</p> <p>Allows Technical Change Coordinator to move the SCR from the technical organization to the functional organization giving full control of the SCR to the functional organization.</p>

Appendix F

Business Rules

■ *Definitions*

Deliverable

This refers to an attribute of a Configuration Item (CI). This attribute, **Deliverable**, is displayed/edited on the **Configuration Item Details** tab in the Configuration Item process. When the **Deliverable** box is checked, Release Management will be automatically notified when a CCO citing the CI has been delivered.

Open SCR routing

An SCR routing with a completion date of 00/00/0000 (see **Approvals** tab on the SCR process System Change Request Part Two window).

Organization Structure

Identifies configuration change orders (CCO's), SCR attachments, and SCR routings to which the current user has access.

CCO's:

Includes all having an Assign To value equal to*:

- Blank
- The current user's CMIS ID
- If the current user is an AM:
 - The CMIS ID of any of the AM's employees
 - The CMIS ID of any of the AM's Sub-AM's

NOTE All CCO's are within the organization structure of the following user types*:

- TCC (when the Assign to CMIS ID is a Technical user)
- FCC (when the Assign to CMIS ID is a Functional user)

SCR attachments:

Includes all attachments with a CMIS ID value equal to*:

- The current user's CMIS ID
- If the current user is an AM:
 - The CMIS ID of any of the AM's employees
 - The CMIS ID of any of the AM's Sub-AM's

SCR Routings:

Includes all open routings to CMIS ID's equal to*:

- The current user's CMIS ID
- If the current user is an AM:
 - The CMIS ID of any of the AM's Employees
 - The CMIS ID of any of the AM's Sub-AM's

*All are within the Organization Structure of user types CMIS Administrator and CM.

Release Item

Category of configuration item (CI) as shown on the Release Certification Report. This determined by the **Release Location** attribute of the CI. When the **Release Location** field contains anything other than "N/A" (uppercase) or spaces, the CI and any CCO citing it will be flagged as a release item on the Release Certification Report.

SCR Routing Types

Routing Type	Gives User to Whom Routed Access to
Initial Entry	<p>All SCR sections except CCB Disposition. Note: Remote Users can never access the CCO section. The following user types have access to the CCB Disposition section:</p> <ul style="list-style-type: none"> ● CMIS Administrator ● CM ● RM ● TCC ● FCC ● TCC/AM ● FCC/AM <p>Created by system when SCR is first created.</p>
Supervisor	<p>SCR General Information SCR Attachment for add SCR Attachment for delete for those attachments added by a user in current user's organization structure</p> <p>Note: When a closed routing of this type exists, the following user types have access to the CCO Disposition section:</p> <ul style="list-style-type: none"> ● CMIS Administrator ● CM ● RM ● TCC ● FCC ● TCC/AM ● FCC/AM <p>Created by system when SCR is first routed from Employee to AM or when first routed to TCC/FCC.</p>
Requirements Analysis	<p>All SCR sections if the user is one of the following types:</p> <ul style="list-style-type: none"> ● CMIS Administrator ● CM ● TCC ● FCC ● TCC/AM ● FCC/AM <p>Other user types:</p> <p>SCR General Information SCR Requirement Definition SCR Attachment for add SCR Attachment for delete for those attachments added by a User in current user's organization structure.</p>
Functional Analysis	<p>SCR Functional Analysis SCR Attachment for add SCR Attachment for delete for those attachments added by a User in current User's organization structure</p>

Routing Type	Gives User to Whom Routed Access to
Technical Analysis	SCR Technical Analysis SCR CCO SCR Attachment for add SCR Attachment for delete for those attachments added by a User in current User's organization structure
Requirements Review	SCR Requirement Definition SCR CCB Disposition section
Requirements Rewrite	SCR Requirement Definition
Initial Impacting	SCR Attachment for add SCR Attachment for delete for those attachments added by a User in current User's organization structure
Higher Authority	Higher Authority Approval/Disapproval routing closure.
Final Impacting	SCR CCO SCR Attachment for add SCR Attachment for delete for those attachments added by a User in current User's organization structure
Locked	None. Created by system when the release to which the SCR is assigned is locked.
CM Certified	None. Created by system when the release to which the SCR is assigned is certified. This prevents all further modification to the SCR.
Transfer Control	None. Used to transfer control of SCR from FCC to TCC or from TCC to FCC. This routing updates the Organizational Control fields to functional or technical depending upon whether the routing is to the FCC or TCC.
PCC	None. Obsolete. Retained for legacy data only.

SCR Edits

• SCR General Information Edits

User Type	When
CMIS Administrator	Always
TCC FCC TCC/AM FCC/AM	SCR organization control = User's Function/Technical type And SCR status is not Approved Locked or Completed Certified
AM	SCR organization control = User's Function/Technical type And SCR status is not Approved Locked or Completed Certified And An open SCR routing exists for which one of the following is true: <ul style="list-style-type: none"> • The SCR routing is to a user in AM's organization structure and current routing type = Initial Entry. • The SCR routing is to AM and the current routing type = Requirements Analysis or Supervisor.
Other Users	SCR organization control = User's Function/Technical type And SCR status is not Approved Locked or Completed Certified And An open SCR routing to this user exists for one of the following routing types: <ul style="list-style-type: none"> • Initial Entry

User Type	When
	<ul style="list-style-type: none"> Requirements Analysis.

● **Requirement Definition Edits**

User Type	When
CMIS Administrator CM	Always
TCC FCC TCC/AM FCC/AM	SCR organization control = User's Function/Technical type And SCR status is not Approved Locked or Completed Certified
AM	SCR organization control = User's Function/Technical type And SCR status is not Approved Locked or Completed Certified And An open SCR routing exists to a user in AM's organization structure with one of the following routing types: <ul style="list-style-type: none"> Initial Entry Requirements Analysis Requirements Rewrite
Other Users	SCR organization control = User's Function/Technical type And SCR status is not Approved Locked or Completed Certified And An open SCR routing to this user exists with one of the following routing types: <ul style="list-style-type: none"> Initial Entry Requirements Analysis Requirements Rewrite

● **Functional Analysis Edits**

User Type	When
CMIS Administrator CM	Always
TCC FCC TCC/AM FCC/AM	SCR organization control = User's Function/Technical type And SCR status is not Approved Locked or Completed Certified
AM	SCR organization control = User's Function/Technical type And SCR status is not Approved Locked or Completed Certified And An open SCR routing exists and to a user in AM's organization structure with one of the following routing types: <ul style="list-style-type: none"> Initial Entry Functional Analysis
Other User	SCR organization control = User's Function/Technical type And SCR status is not Approved Locked or Completed Certified And

	<p>An open SCR routing to this User exists with one of the following routing types:</p> <ul style="list-style-type: none"> ● Initial Entry ● Functional Analysis
--	--

● **Technical Analysis Edits**

User Type	When
CMIS Administrator CM	Always
TCC FCC TCC/AM FCC/AM	<p>SCR organization control = User's Function/Technical type</p> <p>And</p> <p>SCR status is not Approved Locked or Completed Certified</p>
AM	<p>SCR organization control = User's Function/Technical type</p> <p>And</p> <p>SCR status is not Approved Locked or Completed Certified</p> <p>And</p> <p>An open SCR routing exists to a user in AM's organization structure with one of the following routing types:</p> <ul style="list-style-type: none"> ● Initial Entry ● Technical Analysis
Other User	<p>SCR organization control = User's Function/Technical type</p> <p>And</p> <p>SCR status is not Approved Locked or Completed Certified</p> <p>And</p> <p>An open SCR routing to this User exists with one of the following routing types:</p> <ul style="list-style-type: none"> ● Initial Entry ● Technical Analysis

● **CCB Disposition Edits**

User Type	When
CMIS Administrator	Always
CM	SCR status is not Approved Locked or Completed Certified
TCC TCC/AM	<p>SCR status is not Approved Locked or Completed Certified</p> <p>And</p> <p>One of the following is true:</p> <ul style="list-style-type: none"> ● A closed routing type = Supervisor exists. ● A routing type = Initial entry exists (open or closed) for any user of one of the following types: <ul style="list-style-type: none"> - CMIS Administrator (Supervisor) - CM - RM - TCC - FCC - TCC/AM - FCC/AM
Other Users	An open routing to this user of type = Requirements Review exists.

● **Configuration Change Orders (CCO) Edits**

User Type	When
CMIS Administrator CM	Always
TCC FCC TCC/AM FCC/AM	SCR organization control = User's Function/Technical type And SCR status is not Approved Locked or Completed Certified
AM	SCR organization control = User's Function/Technical type And SCR status is not Approved Locked or Completed Certified And An open SCR routing exists to a user in AM's organization structure with is one of the following routing types: <ul style="list-style-type: none"> ● Initial Entry ● Technical Analysis ● Initial Impacting ● Final Impacting
Other User except Remote User	SCR organization control = User's Function/Technical type And SCR status is not Approved Locked or Completed Certified And an open SCR routing to this user exists with one of the following routing types: <ul style="list-style-type: none"> ● Initial Entry ● Technical Analysis ● Initial Impacting ● Final Impacting

■ **SCR Attachment Actions**

● **Export**

User Type	When
Any user	Anytime

● **View**

User Type	When
Any user	Anytime

● **Add**

User Type	When
CMIS Administrator (Supervisor)	When SCR status is not Completed/Certified
Configuration Manager	When SCR status is not Completed/Certified

User Type	When
Action Manager	<p>During Initial Entry by AM</p> <p>Or</p> <p>When an open SCR routing exists to this AM with routing type = Supervisor</p> <p>Or</p> <p>When an open SCR routing exists to this AM or an user in this AM's organization structure with one of the following routing types:</p> <ul style="list-style-type: none"> ● Initial Impacting ● Final Impacting ● Functional Analysis ● Technical Analysis ● Requirements Analysis
Other users	<p>When an open SCR routing exists to this User with one of the following routing types:</p> <ul style="list-style-type: none"> ● Initial Entry ● Supervisor ● Initial Impacting ● Final Impacting ● Functional Analysis ● Technical Analysis ● Requirements Analysis

● **Delete**

User Type	When
CMIS Administrator (Supervisor)	When SCR status is not Completed/Certified
Configuration Manager	When SCR status is not Completed/Certified
Action Manager	<p>When the selected attachment was added by this AM or the AM's employee and a open SCR routing exists to the AM with routing type = Supervisor</p> <p>Or</p> <p>When the selected attachment was added by this AM or an user in this AM's organization structure and an open SCR routing exists to this AM or AM or an user in this AM's organization structure with one of the following routing types:</p> <ul style="list-style-type: none"> ● Initial Entry ● Initial Impacting ● Final Impacting ● Functional Analysis ● Technical Analysis ● Requirements Analysis
Other users	<p>When the selected attachment was added by this user and an open SCR routing exists to this user with one of the following routing types:</p> <ul style="list-style-type: none"> ● Initial Entry ● Supervisor ● Initial Impacting ● Final Impacting ● Functional Analysis ● Technical Analysis ● Requirements Analysis

Appendix G

External Interface Window

External Interface Data Set Description	Export Subject to “Release s” Parameter	File Name Containing Data	Data Exported
AIS Information	No	CMSPB96	Contains the parameter data associated with the AIS.
AIS SCR & PTR Number Assignments	No	CMSPB40	Contains the next assignable SCR and PTR numbers or identifiers.
Configuration Item Types	No	CMSPB89	Contains the Configuration Item Types for the AIS.
Configuration Items	No	CMSPB04	Contains the Configuration Items for the AIS.
Configuration Item Function Points	No	CMSPB06	Contains the Function Point data elements by Configuration Items for the AIS.
CI Delivery	Yes	CMSPB05A	Contains the Delivery information for Configuration Items.
CI Testing	Yes	CMSPB05B	Contains the Testing information for Configuration Items.
CI Delivery and Testing	Yes	CMSPB05	Contains the Delivery and Testing information for Configuration Items.
User ID's Data	No	CMSPB98	Contains the user identification information for each valid CMIS user.
User ID's Data (Functional Only)	No	CMSPB98	Contains the user identification information for valid functional CMIS users.
User ID's Data (Technical Only)	No	CMSPB98	Contains the user identification information for valid technical CMIS users.
User ID to AIS Access Information	No	CMSPB90	Contains the user identification information and their AIS accesses for each valid CMIS

External Interface Data Set Description	Export Subject to “Release s” Paramet er	File Name Containing Data	Data Exported
			user.
User ID to AIS Access Information (Functional Only)	No	CMSPB90	Contains the user identification information and their AIS accesses for valid functional CMIS user.
User ID to AIS Access Information (Technical Only)	No	CMSPB90	Contains the user identification information and their AIS accesses for valid technical CMIS user.
Resource Unavailability	No	CMSPB100	Contains the dates when a user is not available for scheduling.
Resource Unavailability (Functional Only)	No	CMSPB100	Contains the dates when a functional user is not available for scheduling.
Resource Unavailability (Technical Only)	No	CMSPB100	Contains the dates when a technical user is not available for scheduling.
User Acting Designations	No	CMSPB98A	Contains the “Acting” Assignments for users.
User Acting Designations (Functional Only)	No	CMSPB98A	Contains the “Acting” Assignments for functional users.
User Acting Designations (Technical Only)	No	CMSPB98A	Contains the “Acting” Assignments for technical users.
Messages	Yes	CMSPB94	Contains the internal CMIS messages.
Group ID’s for Messaging Addressing	No	CMSPB91	Contains the mail system group ID’s and associated users.
Group ID’s for Messaging Addressing (Functional Only)	No	CMSPB91	Contains the mail system group ID’s and associated functional users.
Group ID’s for Messaging Addressing (Technical Only)	No	CMSPB91	Contains the mail system group ID’s and associated technical users.
AM to Employee and AM to AM Cross	No	CMSPB70	Contains the Action Manager to Employee and Action

External Interface Data Set Description	Export Subject to “Release s” Parameter	File Name Containing Data	Data Exported
Reference			Manager to Action Manager relationships information.
AM to Employee and AM to AM Cross Reference (Functional Only)	No	CMSPB70	Contains the functional Action Manager to functional Employee and functional Action Manager to functional Action Manager relationships information.
AM to Employee and AM to AM Cross Reference (Technical Only)	No	CMSPB70	Contains the technical Action Manager to technical Employee and technical Action Manager to technical Action Manager relationships information.
Release Data	Yes	CMSPB07	Contains the information relating to a release within the AIS.
Locked Release Audit Data	Yes	CMSPB30	Contains the information relating to a Locked Release within the AIS.
Program Trouble Reports	Yes	CMSPB21	Contains the information relating to Program Trouble Reports within the AIS.
PTR Parent to Child Relationship	Yes	CMSPB73	Contains the information relating to the Parent - Child Relationships for PTR's.
System Change Requests	Yes	CMSPB01	Contains the information relating to SCR's (less the Text, Approvals, and CCO's) within the AIS.
System Change Requests Text	Yes	CMSPB03	Contains the information relating to System Change Request Texts within the AIS.
System Change Request Approval	Yes	CMSPB95	Contains the information relating to System Change Request Approvals within the AIS.
SCR Parent to Child Relationship	Yes	CMSPB72	Contains the information relating to the Parent - Child Relationships for SCR's.

External Interface Data Set Description	Export Subject to “Release s” Parameter	File Name Containing Data	Data Exported
SCR to PTR Cross Reference Data	Yes	CMSPB10	Contains the information representing the SCR to PTR Cross Reference Relationships.
Configuration Change Orders	Yes	CMSPB02	Contains the information relating to Configuration Change Orders for the SCR's.
Configuration Change Orders (Functional Only)	Yes	CMSPB02	Contains the information relating to functional Configuration Change Orders for the SCR's.
Configuration Change Orders (Technical Only)	Yes	CMSPB02	Contains the information relating to technical Configuration Change Orders for the SCR's.
Configuration Item Roll-up	Yes	CMSPB92	Contains the information relating to CCO's, summarized by CI within a release.
Configuration Item Dependencies	Yes	CMSPB93	Contains the Predecessor to Successor Dependency information for CCO's.
CI Testing Test Deficiency Reports	Yes	CMSPB23	Contains the Test Deficiency Report information for Configuration Item Testing.
SCR Testing Tests	Yes	CMSPB50A	Contains the information relating to System Change Request Testing Tests.
SCR Testing Events	Yes	CMSPB50B	Contains the information relating to System Change Request Testing Events.
SCR Testing Tests & Events	Yes	CMSPB50	Contains the information relating to System Change Request Testing Tests and Events.
SCR Testing Test Deficiency Report	Yes	CMSPB51	Contains the information relating to System Change Request Testing Deficiency Reports.
SCR Testing TDR Routings	Yes	CMSPB53	Contains the information relating to System Change

External Interface Data Set Description	Export Subject to “Release s” Paramet er	File Name Containing Data	Data Exported
			Request Testing Deficiency Report routings.
SCR Testing Identified CI's	Yes	CMSPB52	Contains the information relating to the identified broken Configuration Items for System Change Request Testing Deficiencies.
System Testing Tests	Yes	CMSPB55A	Contains the information relating to System/Release Testing Test Levels.
System Testing Events	Yes	CMSPB55B	Contains the information relating to System/Release Testing Test Events.
System Testing Tests & Events	Yes	CMSPB55	Contains the information relating to System/Release Testing Test Levels and Events.
System Testing Test Deficiency Reports	Yes	CMSPB56	Contains the information relating to System Testing Test Deficiency Reports.
System Testing TDR Routing	Yes	CMSPB58	Contains the information relating to System Testing Deficiency Report routings.
System Testing Identified SCR's & CI's	Yes	CMSPB57	Contains the information relating to the SCR containing the Requirements for Change and the identified broken Configuration Items for System Testing Deficiencies.